T O U R I S M

Visitor '89

A Travel Survey of Visitors to British Columbia

ECONOMIC & REGIONAL DEVELOPMENT AGREEMENT

Canada

BC

Visitor '89

A Travel Survey of Visitors to British Columbia

Prepared for:

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Ministry of Regional and Economic Development

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The responsibility for the content of this report is the consultant's alone, and the conclusions reached herein do not necessarily reflect the opinions of those who assisted during the course of this investigation or the federal and provincial governments which funded the study.

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The B.C. Travel Industry

NATURE OF THE INDUSTRY

This section is intended to provide an overview of the B.C. travel industry, and hence some background and perspectives for the Visitor '89 survey results.

The travel industry, also described as the tourism industry, is diverse, involving thousands of independent businesses and dozens of associations and public agencies. Their common objective is to cater to the needs and wants of the travelling public.

The travel industry is comprised of several sectors such as accommodation, food and beverage services, transportation, outdoor recreation and adventure, attractions and events, the travel trade (tour wholesalers and retail travel agencies) and a number of service companies and agencies which serve the travel industry.

Businesses within each of these sectors range from small, family enterprises to large national and international corporations. Though few in number, the latter dominate the industry as far as investment and revenue are concerned.

Government agencies at all levels are also involved in the travel industry. Not only do they promote and regulate many aspects of the industry, but they own and manage many of the resources upon which it depends. These include highways, ferries, parks, museums and natural resources.

The involvement of these travel industry sectors with the tourism industry varies, ranging from high (accommodation) to relatively low (food services). This fact, as well as the number and diversity of businesses involved, results in the diffuse nature of the travel industry and makes it difficult and expensive to compile accurate statistics on the relative contribution of tourism to provincial and national economies.

The economic impact of tourism can be measured in two ways: by measuring the volume and nature of **demand**, i.e., by asking consumers how and where they travelled, what they did and how much they spent, or by measuring **supply**, by asking suppliers of tourism-related products and services how much

business they did and how much was consumed by visitors to the province as opposed to resident travellers. This report summarizes the results of a province-wide demand survey that measured the size and characteristics of non-resident travel to British Columbia in 1989.

Residents of British Columbia, who travel within the province, account for a significant portion of the revenue generated by the tourism industry. In order to assess the nature and size of this aspect of tourist demand, the Ministry of Tourism commissioned a Resident Travel Survey in 1989. A representative sample of British Columbia residents was interviewed each month and their travel behaviours, both within and outside of the province, were described and measured. The results of the resident survey will be presented in a separate report.

In addition to making the distinction between resident and non-resident travel, it is common to define travel and tourism as involving trips of more than one night away from home. Persons making day-trips to British Columbia that were more than 50 km in length, are described as excursionists.

Readers should note that all overnight travel is counted regardless of purpose. Many persons travelling on business or for personal reasons also tend to participate in activities and consume services similar to tourists whose trip purpose is exclusively leisure/pleasure-related. Business-related travel accounts for 17% of non-resident travel.

TOURISM'S VOLUME & VALUE

British Columbia's travel industry makes a significant contribution to the provincial economy and is a very important supplier of jobs. Based on the Visitor '89 Survey, it is estimated that direct travel-related expenditures by *non-resident* tourists exceeded $2.4 billion in 1989, see Table 1.

There are a number of ways that tourism volume can be measured. The base unit of measurement is visitor party-trips since tourists tend to travel with other persons as couples, family groups, or groups of adults, etc. Each trip made into B.C. by a

travel party is counted as one party-trip. In order to estimate the number of visitors to the Province, the number of visitor parties is multiplied by the average party-size to generate an estimate of persons. This unit of measurement is most accurately described as a person-trip but can also be referred to as visitors. A summary of each of these statistics for the Province as a whole is presented in Table 1.

TABLE 1 TOURISM VOLUME & VALUE: NON-RESIDENT MARKETS

	Non-Residents
Number of Parties	3.09 million
Party-Nights	18.00 million
Party-Size	2.47 persons
Person-trips	7.63 million
Person-Nights	43.70 million
Length of Stay	5.83 nights
Expenditure Per Party-Day	$133.50
Expenditure Per Person-Day	$54.90
Gross Expenditures	$2.40 billion

Seasonality

While tourism in British Columbia is still a seasonal industry with much of the business concentrated in the peak summer months of July and August, considerable progress has been made over the years in filling out the "shoulder months" in the fall and spring. The success of British Columbia's ski product in attracting international visitors has also helped increase business in the off-season periods. Room rental sales figures published by the Planning and Statistics Division of the Ministry of Finance and Corporate Relations provide a measure of seasonal travel in the Province. Exhibit 1 shows the seasonal pattern of room sales in 1985 compared to 1989. Readers should note that room revenue data provides only a partial picture of seasonality because room rates tend to vary by season. As a consequence, room rental revenues in the summer period are higher and the seasonal peak appears more pronounced than it may be in reality. Many travellers within British Columbia stay with friends and relatives or use camp-

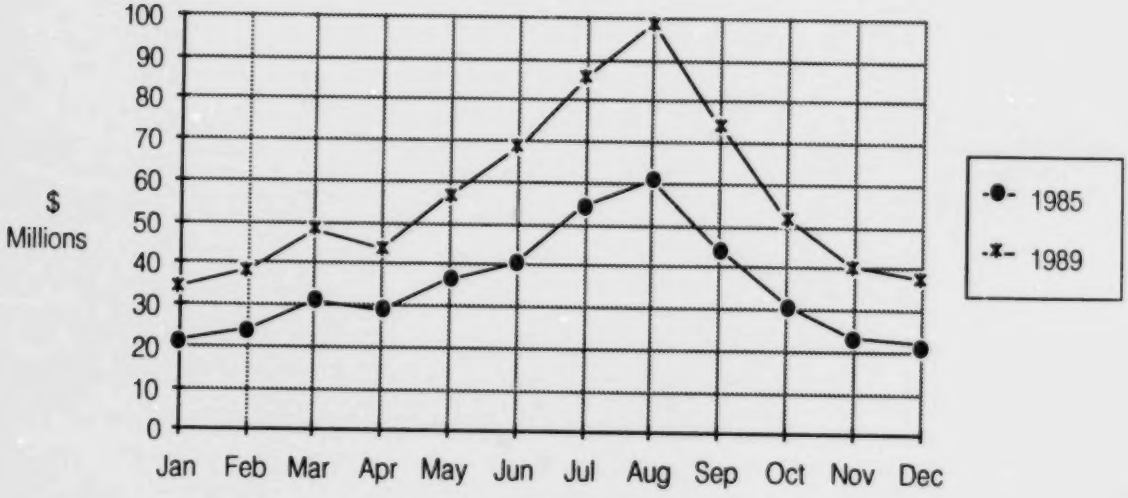
grounds which are not requried to collect the sales tax. Campground usage tends to be greatest in the summer months.

Geographical Distribution

For marketing purposes, British Columbia is divided into nine tourism regions. Their location and relative share of both visitor and resident travel revenues are shown in Exhibit 2.

Over the past ten years there has been a significant shift in the distribution of tourist dollars around the province. Table 2 shows the share of non-resident tourist expenditures captured by each of the nine tourism regions in 1979 and 1989. The data shows that Southwestern British Columbia has significantly increased its share of revenue while all other regions, except Peace River-Alaska Highway and the B.C. Rockies, are capturing a smaller share.

EXHIBIT 1 SEASONAL PATTERN OF ROOM RENTAL REVENUE, 1985 AND 1989



Source: The Planning and Statistics Division of the Ministry of Finance and Corporate Relations.

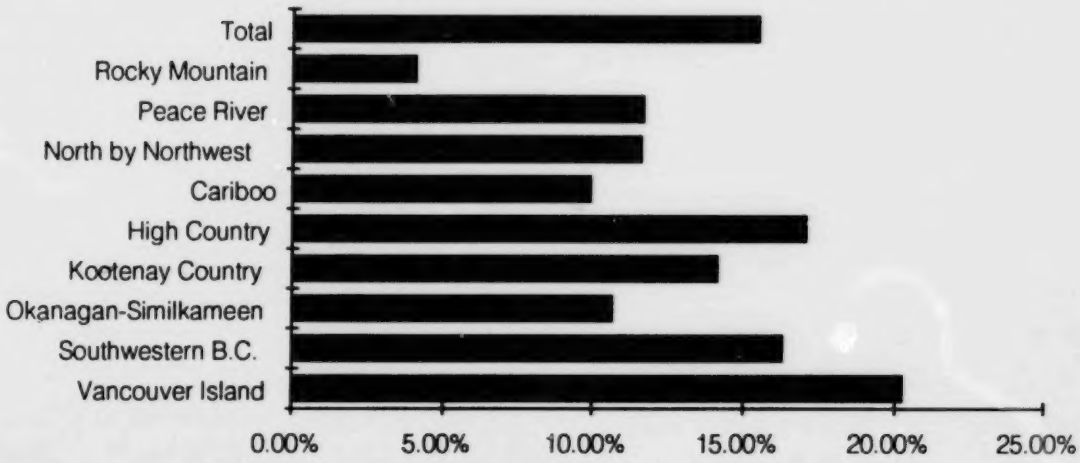
EXHIBIT 2 **BRITISH COLUMBIA'S TOURISM REGIONS**

TABLE 2 **SHARE OF NON-RESIDENT TOURIST EXPENDITURES BY TOURISM REGION, 1979-1989**

Region	1979	1989
Vancouver Island	21%	20%
Southwest B.C.	39%	56%
Okanagan-Similkameen	12%	5%
Kootenay Country	2%	1%
High Country	9%	5%
Cariboo-Chilcotin	3%	1%
North by Northwest	6%	4%
Peace River-Alaska Hwy	2%	2%
B.C. Rockies	6%	7%

Note: The boundaries of North by Northwest and Peace River Alaska changed between 1979 and 1989.

EXHIBIT 3 **ANNUAL AVERAGE GROWTH RATES IN ROOM RENTAL REVENUE BY TOURISM REGION, 1985 TO 1989**



Source: The Planning and Statistics Division of the Ministry of Finance and Corporate Relations

Growth

Over the past ten years, non-resident travel in British Columbia, as measured by the increase in person-trips, has grown at an average rate of 2% per year. In 1979, non-residents made 6.5 million person-trips into British Columbia. By 1989, that total had increased to 7.63 million. Like many other components of the economy, the industry suffered setbacks in the recession of 1982-1985, but after the successful Expo'86, has experienced strong gains in most markets. While the United States market has grown relatively little since the recession, British Columbia is becoming increasingly popular with visitors from overseas. International visitors now account for 10% of volume, and 15% of revenue.

Over the past four years, the rate at which tourism revenues have grown has accelerated. Room rental revenues for example increased 60% between 1985 and 1989 from $416 million to $674 million. Not all regions within the Province experienced equal rates of growth. Exhibit 3 shows that Vancouver Island and the High Country regions had the greatest gains in revenues.

The Visitor '89 Survey

INTRODUCTION

The Visitor '89 data presented in this report is a composite of data compiled from two separate surveys of non-resident visitors to British Columbia: Visitor '87 which took place between July and October 1987 and Visitor '89 which took place between November, 1988 and June, 1989. The combined results present tourism researchers with the first opportunity to examine year-round travel to British Columbia. All previous exit surveys — Visitor '79 and Visitor '74 — have only covered the summer season.

Visitor '87 and Visitor '89 both involved surveying travellers arriving in B.C. at major highway, airport and marine entry points. Although the two studies were similar in scope, they differed in certain areas of methodology. The main components of each study are outlined below.

Visitor '87

1. A short screening interview with a representative sample of out-of-province visitors;
2. Distribution of diaries to 3 out of 4 of these visitors who planned to spend one or more nights in British Columbia;
3. Follow-up in depth interviews with the remaining one out of four visitors by phone (for North America) or in airport departure lounges for overseas visitors.

Visitor '89

1. A short screening interview with a representative sample of out-of-province visitors;
2. Distribution of diaries to **all** qualified tourists who planned to spend one or more nights in B.C., **and** to one in eight screened excursionists (same-day visitors);
3. Follow-up in-depth telephone interviews with a sample of 600 visitors who had been given diaries. (Airport exit interviews were not conducted.)

Visitor '87 was undertaken by Marktrend Marketing Research, B.C. Research and the Economic Planning Group. Visitor '89 was undertaken by Campbell Goodell Consultants Ltd., B.C. Research and the Tourism Research Group.

SURVEY OBJECTIVES

The purpose of these surveys was to produce data about visitors to B.C. and their trip characteristics. The data will be used in provincial tourism marketing and development planning. Specific survey objectives were:

- to determine visitor characteristics, origins and travel patterns;
- to determine visitor expenditures by travel industry sector and region;
- to determine visitor activities, likes and dislikes;
- to identify changes in visitor characteristics since 1979, and the significance of these changes for marketing and development strategies; and
- to classify visitors according to vacation type.

METHODOLOGY

Out-of-province visitors were contacted as they entered B. C. at major highway, airport and marine entry points. In the 1987 study, visitors planning to spend one or more nights in B.C. were asked, after a brief screening interview, either to:

1. Complete a diary during their stay in B. C. and mail it to Survey Headquarters in the business reply envelope provided (75% of those screened), or
2. Provide their name and home phone number for a follow-up telephone interview (25%).

Methodology for the 1989 study differed in that all qualified respondents were asked both to complete a diary and to provide their name and home phone number for a follow-up interview. Respondents for the telephone component were subsequently drawn at random from all the returned interviewer screening forms.

In contrast to the diary, which elicited facts about places visited, accommodation used, daily activities, expenditures and background information on the travel party, the focus of the telephone interviews (and in 1987, the airport interviews) was the impression visitors had of British Columbia. Both the diary and telephone questionnaire were designed to be compatible with the new Tourism Database Framework introduced by the Ministry of Tourism.

Only non-residents of British Columbia who were not simply in-transit were included in the study. To minimize delay between screening interviews and to ensure a random selection, interviewers were instructed to approach the next party passing, immediately after completing the previous interview.

The sampling schedule ensured proper representation of daylight hours, weekday and weekend entries, month of interviewing, (at airports) qualifying flights, (for cruises and ferries) qualifying vessels, and (for tours) a variety of tour companies. Entry points were visited by a Field Supervisor, who trained interviewers on location.

Response Rates: Visitor '87

During the survey period from June 27 to October 31, 1987, a total of 13,743 visitor parties were screened, representing about 1% of total visitor traffic during this time. These parties included 2,940 parties of excursionists (same-day visitors), and 10,803 tourists (one-or-more night travellers or visitor parties.) Diaries were distributed to tourist parties only. Of 8,102 diaries distributed, 3,225 were returned for a response rate of 40%.

Response Rates: Visitor '89

During the survey period from November 1, 1988 to June 30, 1989, a total of 13,357 parties were screened. Diaries were distributed to 8,775 tourists and to 1,085 excursionists. Of all 9,860 diaries distributed, 4,401 were returned, for a response rate of 44.6%.

Main Findings

WHERE DO VISITORS COME FROM?

In 1989, approximately 3.1 million non-resident visitor parties, equivalent to 7.63 million persons, visited the Province of British Columbia. They spent a total of 18 million party-nights, equivalent to 43.7 million person-nights in the province during their stay.

Approximately one out of every two parties (48%) had come from Canada, 42% were Americans and 10% had come from other international sources, see Exhibit 4.

Canadian Visitors

Canada is becoming an increasingly important source of visitors to British Columbia: while Alberta continues to dominate the Canadian market — 23% of all parties and 25% of all party-nights were made by Albertans — Ontario now contributes a 13% share of visitors, 17% of party-nights and, most importantly, an even larger share of revenue: 22%, see Exhibit 5. Ontario visitors now outnumber and outspend visitors from California by a factor of 1.6 and 2.6 respectively, see Table 3. Visitors from other provinces in Eastern Canada are also increasing both absolutely and relatively.

Visitors from the United States

As far as the American market is concerned, the major source of visitors continues to be neighbouring Washington whose residents comprise 14% of all visitor parties. However, since visitors from this market tend to make shorter trips and spend less per capita than visitors from other parts of the United States, their relative contribution to revenue drops to only 7%. Washingtonians contributed $168 million to our tourism economy in 1989, whereas Californians spent $216 million.

International Visitors

The international market has gained significantly in importance in terms of both numbers and spending since 1979 and now accounts for 10% of all visitor parties and 16% of revenues. The top producing countries for British Columbia are the United Kingdom, West Germany, Japan, Hong Kong and Australia. The international market is expected to become an increasingly important source of tourists to British Columbia. Arrivals from several countries within the Asia-Pacific region, for example, are increasing at an annual rate exceeding 20%.

EXHIBIT 4 **ORIGIN OF VISITOR PARTIES**

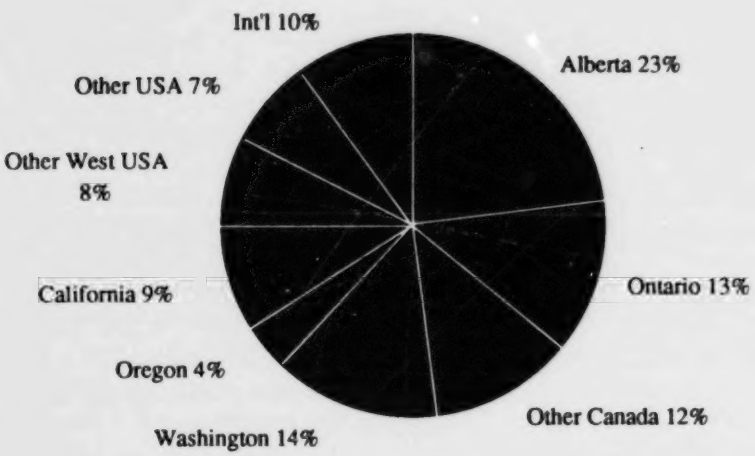


EXHIBIT 5 **MARKET SHARE: VISITORS AND REVENUE**

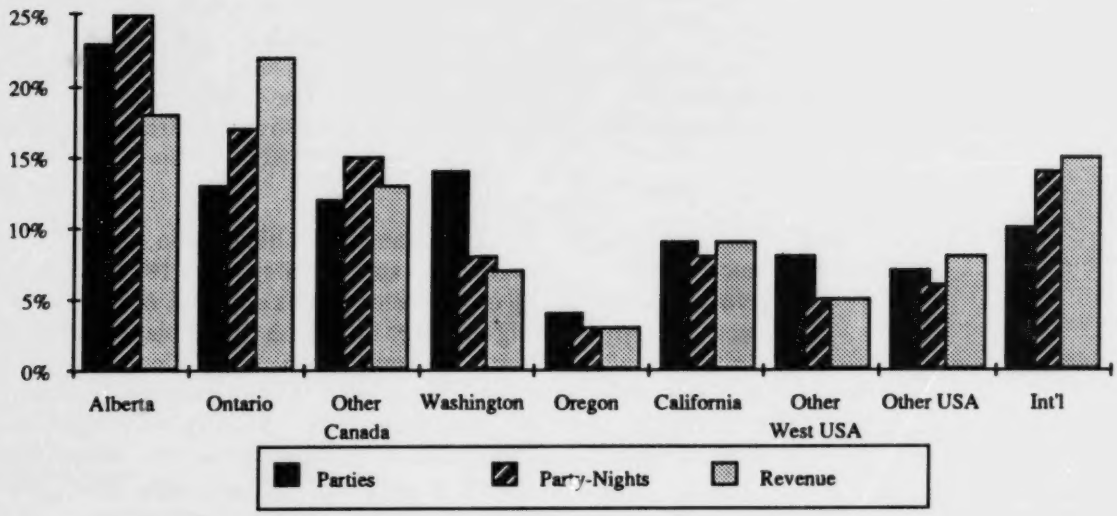


TABLE 3 ORIGIN OF VISITOR PARTIES AND REVENUE

Origin of Visitors	Parties	Party-Nights	Revenue
Alberta	710,700	4,500,000	$432,000,000
Ontario	401,700	3,060,000	$528,000,000
Other Canada	370,800	2,700,000	$312,000,000
Sub Total Canada	**1,483,200**	**10,260,000**	**$1,272,000,000**
Washington	432,600	1,440,000	$168,000,000
Oregon	123,600	540,000	$72,000,000
California	278,100	1,440,000	$216,000,000
Other West USA	247,200	900,000	$120,000,000
Other USA	216,300	1,080,000	$192,000,000
Sub Total USA	**1,297,800**	**5,400,000**	**$768,000,000**
International	309,000	2,520,000	$360,000,000
TOTAL	**3,090,000**	**18,000,000**	**$2,400,000,000**

Origin of Visitors	% of Parties	% of Party-Nights	% of Revenue
Alberta	23%	25%	18%
Ontario	13%	17%	22%
Other Canada	12%	15%	13%
Sub Total Canada	**48%**	**57%**	**53%**
Washington	14%	8%	7%
Oregon	4%	3%	3%
California	9%	8%	9%
Other West USA	8%	5%	5%
Other USA	7%	6%	8%
Sub Total USA	**42%**	**30%**	**32%**
International	10%	14%	15%
TOTAL	**100%**	**101%**	**100%**

WHERE ARE THEY GOING?

Not all of our visitors consider British Columbia to be their main destination; nearly 27% of the parties, who spent one or more nights in B.C., were destined for some other province or state. The most popular of these alternative destinations was Alberta (6%), the "rest of the U.S." (6%), and Alaska (5%) (see Exhibit 6).

Main Destination

Visitors were asked to name their main destination within British Columbia. Over half named a community within the S.W.B.C. tourism region and an additional 19% named Vancouver Island. These two regions were the main destination for three out of every four visitors to the Province (see Exhibit 7).

Regional Shares of Visitor Parties

Since most visitors travel to more than one region within the Province, the relative share of visitor parties attracted by each region differs from the "main destination" exhibit. For example, while only 3% of the respondents named a community within the High Country as their main destination, 15% reported spending at least one night in that region. This result highlights the important location of the region on the Trans Canada Highway, virtually equidistant from the Coast and destinations in the Rocky Mountains. Similarly, the Peace River Alaska Highway region was named as a main destination by only 1% of non-resident tourists, but accommodated approximately 4%, many of whom were en route to Alaska, (see Exhibit 8).

Regional Share of Party-Nights

The relative market share attracted by each tourist region is more accurately demonstrated by share of party-nights as this takes into account variable lengths of stay in a region and the fact that visitors can only spend the night in one region at a time. Greater Vancouver attracted the largest share of visitors: in 1989, 39% of all party-nights were spent in this metropolitan region. Next in popularity was Greater Victoria which accommodated an 11% share of party-nights. As shown in Exhibit 9 and Table 4, the two regions of S.W.B.C. and Vancouver Island, including the cities of Vancouver and Victoria, captured 69% of the non-resident tourist market in terms of party-nights and 76% when measured by share of revenue.

EXHIBIT 6 **MAJOR DESTINATION THIS TRIP**

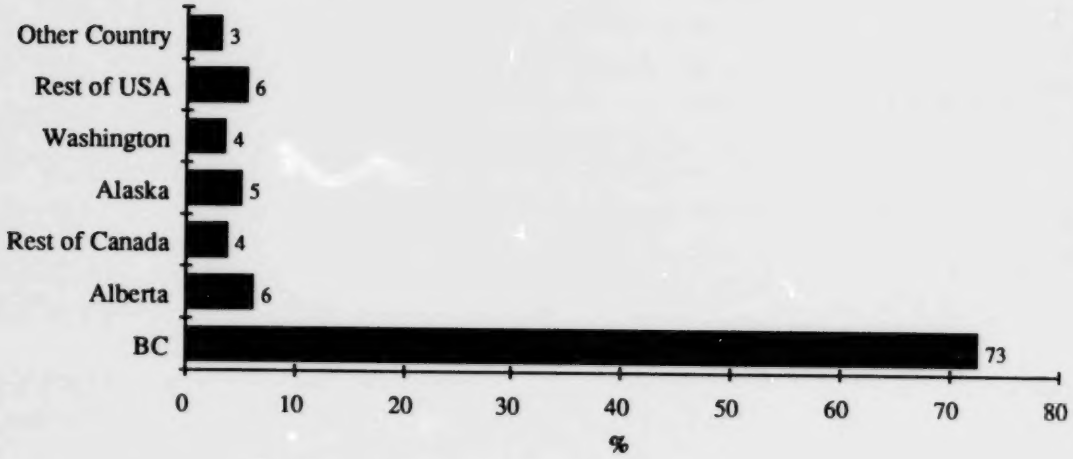


EXHIBIT 7 **MAJOR DESTINATION IN BRITISH COLUMBIA**

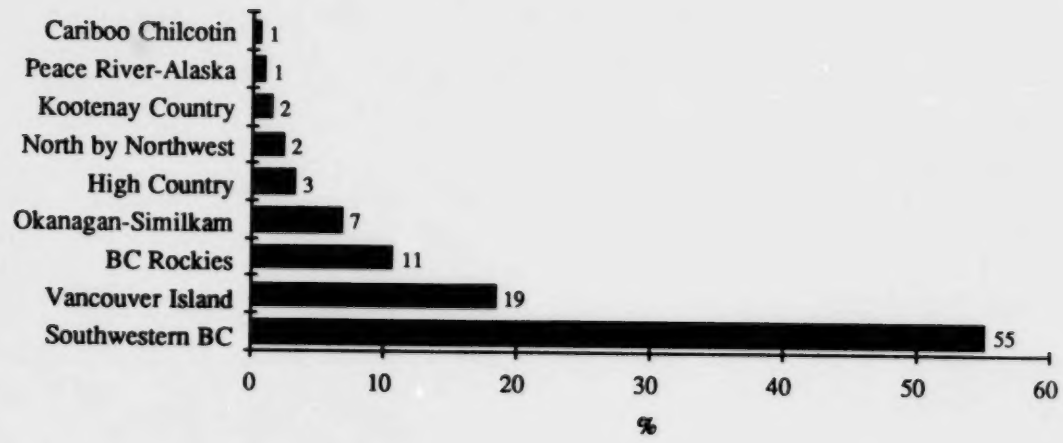
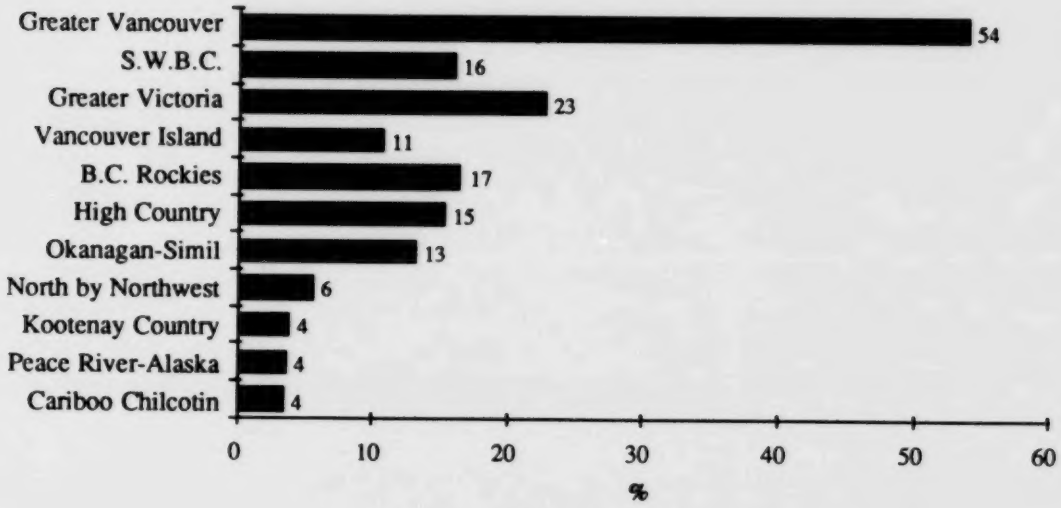


EXHIBIT 8 **REGIONS VISITED (PARTIES)**



Note: S.W.B.C. region excludes Vancouver, and the Vancouver Island region excludes Victoria since results for these communities are presented separately.

EXHIBIT 9 **MARKET SHARE: PARTY-NIGHTS & REVENUE BY REGION**

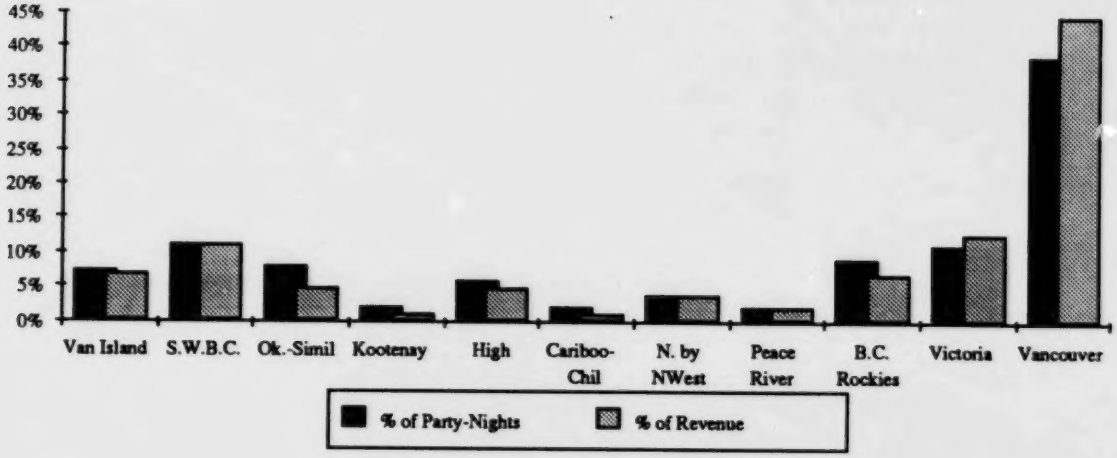


TABLE 4 **REGIONS VISITED WITHIN THE PROVINCE**

Region Visited	Parties	Party-Nights	Revenue
Vancouver Island	339,900	1,440,000	$168,000,000
S.W.B.C.	494,400	1,980,000	$264,000,000
Okanagan-Simil	401,700	1,440,000	$120,000,000
Kootenay Country	123,600	360,000	$24,000,000
High Country	494,400	1,080,000	$120,000,000
Cariboo Chilcotin	123,600	360,000	$24,000,000
North by Northwest	185,400	720,000	$96,000,000
Peace River-Alaska	123,600	360,000	$48,000,000
B.C. Rockies	525,300	1,620,000	$168,000,000
Greater Victoria	710,700	1,980,000	$312,000,000
Greater Vancouver	1,668,600	7,020,000	$1,080,000,000
TOTAL	**3,090,000**	**18,000,000**	**$2,400,000,000**

Region Visited	% of Parties	% of Party-Nights	% of Revenue
Vancouver Island	11%	8%	7%
S.W.B.C.	16%	11%	11%
Okanagan-Simil	13%	8%	5%
Kootenay Country	4%	2%	1%
High Country	16%	6%	5%
Cariboo Chilcotin	4%	2%	1%
North by Northwest	6%	4%	4%
Peace River-Alaska	4%	2%	2%
B.C. Rockies	17%	9%	7%
Greater Victoria	23%	11%	13%
Greater Vancouver	54%	39%	45%
Total	*** 168%**	**** 102%**	**** 101%**

* The percentage total exceeds 100 because visitor parties stayed in more than one region.** The percentage total exceeds 100 due to rounding.

Regional Share of Revenue

The relative importance of the southwestern corner of the province in terms of attracting and servicing non-resident visitors is further evidenced by the fact that they attract a disproportionate share of revenue: Greater Vancouver captured 45% of all tourist spending in B.C. in 1989 and Victoria received 13%. In 1989, 75% of all non-resident revenue was spent in just two regions of the province, Southwestern B.C. and Vancouver Island.

HOW DO THEY TRAVEL TO BRITISH COLUMBIA?

Canadian Visitors

The use of various entry points into the Province varies significantly according to the origin of visitors. Because of the growing importance of visitors from Eastern Canada, a significant portion of Canadian visitors (48%) arrive via Vancouver International Airport, Table 5. As many as 90% of visitors from Ontario and 66% of visitors from other parts of Eastern Canada arrived via plane. Almost as many Canadians arrived by driving over the Alberta border — 44%. The balance drove to B.C., but crossed into the United States first and entered the Province by one of the crossings along the American border.

American Visitors

The American visitor market continues to be a "rubber tire" market with car or R.V. being the main mode of transportation, accounting for over 95% of visitors from Washington, and 70% of Californians, see Exhibit 10. Propensity to use air increases with distance from B.C. — nearly 40% of tourists from other parts of the U.S. (Central and Eastern states) came by air in 1989. This market was also most likely to report they used a rental car to travel to B.C. Many flew to Seattle first and then entered Canada in a rental car. Because of the general dominance of road travel by the American market, 74% cross over at one of the border crossings in the south of the province with one in three using Douglas crossing south of Vancouver. Approximately 13% enter British Columbia via the Alberta border.

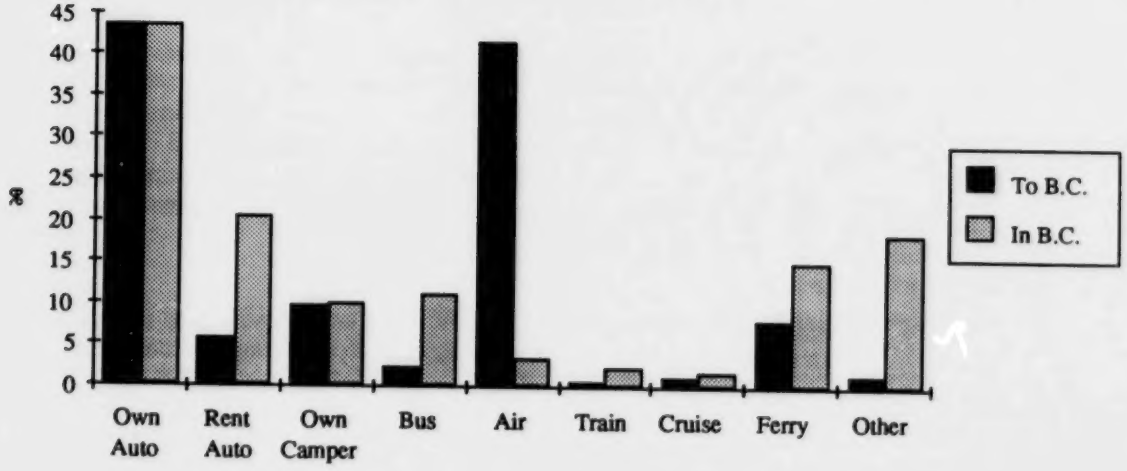
International Visitors

It is interesting to note that while 74% of the international visitors reported that air was the primary mode of transport used to

TABLE 5 **ENTRY POINTS IN BRITISH COLUMBIA**

Entry Point	Canada %	U.S.A. %	Int'l %	Total %
Vancouver Island	0	15	3	7
Douglas & Other	3	33	13	17
Other Lower Mainland	3	10	1	6
Southern BC	2	12	1	7
Alberta Border	44	13	20	28
Van Airport & Other	48	13	60	33
Missing	1	4	2	2
TOTAL	**100**	**100**	**100**	**100**

EXHIBIT 10 **METHOD OF TRAVEL TO & WITHIN BRITISH COLUMBIA**



travel to B.C., only 33% were recorded as arriving via the Vancouver International Airport or other B.C. airports. This apparent discrepancy is partly explained by the fact that many of these visitors actually fly into gateway airports outside B.C. such as Seattle, Calgary and Toronto and then use ground transportation (rental car, bus and train) to get to the province. As many as 28% of the international tourists reported crossing into British Columbia via Alberta.

HOW DO THEY TRAVEL WITHIN B.C.?

While 60% of visitor parties used a car or camper to travel to British Columbia, as many as 75% used a car to travel around the province, see Exhibit 10. Rental car companies, for example, provided transportation for as many as 21% of the visitor market. Use of rental cars was greatest for visitors from "other U.S." and international sources.

While 11% of all visitor parties reported using bus transportation to travel within British Columbia, this mode of travel was most popular with visitors from international sources — nearly one-third of all visitors from this source travelled by bus.

Despite the fact that air transportation has become such an important means of bringing visitors to British Columbia, air carriers are used relatively little as a means of travelling around the province. Only 4% of all visitor parties reported using air to travel within British Columbia. The markets showing greatest propensity to use air services were Ontario, Eastern Canada and International.

Use of Package Tours

Only 6% of the sample indicated that their visit was part of a package tour. In some markets, this percentage increased significantly — 15% of visitor parties from "other U.S.A." and also from International sources, reported visiting B.C. as part of a vacation package.

WHEN DO THEY COME?

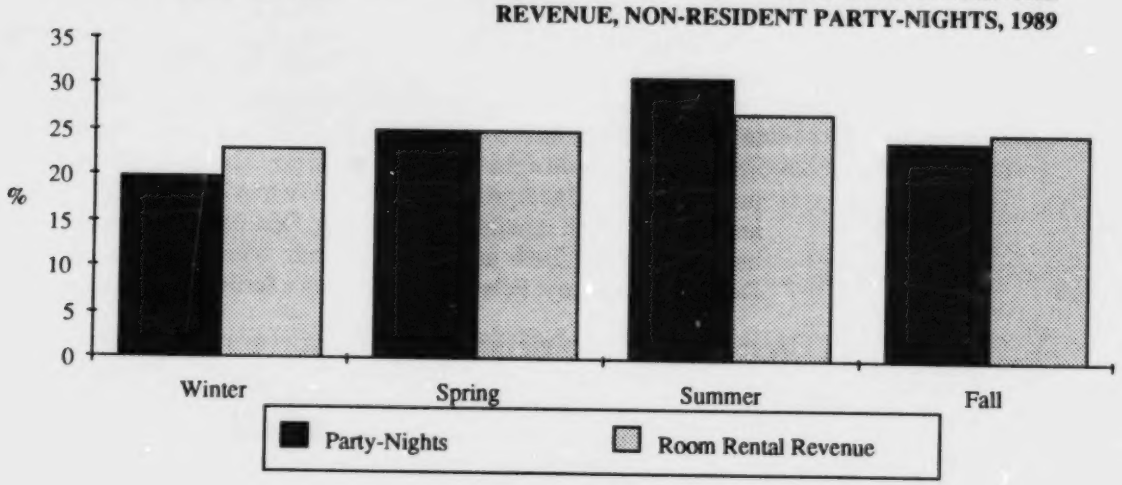
The results of Visitor '89 confirm that the majority of visitors to British Columbia come in the summer — 31% arrive between July and August. The next most popular travel period is spring (defined as April, May and June) when 25% of all trips are made. The fall months of September, October and November account for 24% and over the four winter months of December, January, February and March a further 19% arrive.

Exhibit 11 compares the seasonal patterns of party-nights as predicted by Visitor '89 and room rental revenue as measured by the Central Statistics Bureau which maintains a census of all lodging properties paying bed tax. Since the correlation is relatively close, the monthly distribution of room rental revenue was used to predict the number of non-resident visitors for any season of the year. Exhibit 11 shows the relative importance of season as a source of room rental revenue and Table 6 shows the results of applying that distribution to figures for non-resident travel. The busiest month for non-resident tourism is August, when as many as 1.075 million non-resident person-trips are made by tourists visiting the province.

WHY DO THEY COME?

Non-resident visitors come to British Columbia for a variety of reasons, see Table 7. In 1989 as many as half were visiting the Province for reasons not directly related to a vacation. A business-related reason was cited by 17% of all visitor parties, and a further 33% indicated that their main purpose was to visit friends and relatives (30%), or to take care of personal matters (3%). This does not mean that these visitors are not an important part of the tourist market, as many actually participated in leisure/tourist activities while they are in the Province, however, they are less easily influenced by the marketing efforts of the Ministry and the private sector.

EXHIBIT 11 **SEASONAL TRAVEL PATTERNS: ROOM RENTAL REVENUE, NON-RESIDENT PARTY-NIGHTS, 1989**



Source: The Planning and Statistics Division of the Ministry of Finance and Corporate Relations.

TABLE 6 **MONTHLY DISTRIBUTION OF NON-RESIDENT VISITORS**

Month	Person-Trips '000's
January	368
February	416
March	522
April	472
May	614
June	744
July	931
August	1075
September	808
October	563
November	436
December	403
TOTAL	**7.63 MILLION**

Note: These monthly volumes of non-resident visitors are estimates only and provided to show an approximate "order of magnitude" for travel in any given month.

The most important leisure-related purpose that was given by visitors was "touring" — as many as 27% of our non-resident visitors came to British Columbia in order to tour the region. Propensity to be on a touring trip varies significantly according to the origin of the party. Over half of the visitors from "other U.S." were taking a touring trip; 45% of Americans from "other West U.S." and 43% of Californians also reported their trip was for touring purposes.

8% of the total sample described the main purpose of their trip as either an outdoors trip or a wilderness/adventure trip. Again, propensity to cite this purpose varied significantly by origin with visitors from Washington and Oregon being most likely to be taking this type of trip — 11% and 15% respectively.

TABLE 7

MAIN PURPOSE OF TRIP

Conference/Convention	4.1
Corporate Meeting	1.9
Trade Show	0.1
Sub Total	**6.1**
Other Business	10.6
Visit Friends & Relatives	30.2
Personal Matter	3.0
Sub Total	**33.2**
Touring Trip	26.9
City Trip	3.0
Outdoors Trip	5.9
Wilderness Adventure	1.9
Sub Total	**7.8**
Resort Vacation	7.7
Cruise	1.9
Visit Theme Park	0.7
Special Exhibit	2.1
Sub Total	**12.4**
TOTAL	**100**

Visitors from Ontario and Eastern Canada appear to be least interested in an outdoors trip in B.C.

While only 3% of the total sample described their trip as a "city-trip", as many as 11% of the visitor parties from Washington and 6% from Oregon classified their visit this way.

The appeal of a cruise up the inside passage to Alaska attracted 8% of the Californian visitors and 6% of our visitors from "other U.S." states.

TABLE 8 ACTIVITIES PARTICIPATED IN WHILE IN B.C.

Activity	Party-Nights %
Conference/Convention	2
Corporate Meeting	2
Trade Show	0
Sporting Event	2
Festival/Cultural	5
Other	1
Went Shopping	36
Took a Tour	9
Sightseeing	42
Passing Through	17
Business Related	14
Other Outdoor	21
Skiing*	4
Other Sporting	8
Nightlife	11
Other	2
Beach/Lakeshore	21
Museum/Historic	14
Fair/Amusement Park	3
Gardens/Parks	20
Friends & Relatives	37
Other	2

* Skiing activity was included in winter survey only.

WHAT ACTIVITIES DO VISITORS TAKE PART IN?

The four most popular activities participated in by all visitors were: sightseeing (42%), shopping (36%), visiting friends and relatives (37%) and being in the outdoors (21%), see Table 8.

Propensity to take part in any given activity varies between markets. Visitors from the United States and international markets were much more likely to take a tour, and go sightseeing than other visitor parties; they were also more likely to visit a museum and historic site, and a garden or park than visitors from Canadian sources.

Conversely, visitors from Alberta and neighbouring Washington were more likely to be participating in an outdoor or sporting activity including fishing.

WHAT TYPE OF ACCOMMODATION DO THEY USE?

Commercial accommodation establishments, which pay a bed tax, captured 38% of all party-nights spent in British Columbia by non-resident tourists in 1989. As seen in Exhibit 12, campgrounds (both public and privately operated) were used by 16% of the respondents, bed and breakfasts captured 1% of the accommodation market, cruise ships accommodated 1% and as many as 37% stayed with friends and relatives.

Propensity to use commercial accommodation also varies with market origin. Hotels were used more by visitors from Ontario (24%) and "other U.S." (24%) sources. Motels were most popular with tourists from Oregon, "other West" and "other U.S." visitors. Half of the visitors from Ontario and Eastern Canada stayed with friends and relatives. Camping was most popular with visitors from Oregon (37%), California (29%) and "other west U.S," (28%).

HOW LONG DO THEY STAY?

Length of Trip

Non-resident tourists spent an average of 14 nights away from home (Table 9) in 1989 of which 5.83 nights were spent in British Columbia. The sample was fairly evenly split with just over half of the visitors spending four nights or less in the Province and the balance staying more.

The average length of stay in the Province varies with origin and, to some extent, distance. International visitors stay the longest: 8.4 nights and visitors from Ontario and Eastern Canada run a close second — 7.8 and 7.3 nights respectively. Of our American visitors, Californians stay the longest, 5.0 nights, and Washingtonians make relatively short trips, 3.2 nights on average. As many as half of the Albertans stayed more than five nights during their visit to British Columbia in 1989.

HOW MUCH DO VISITORS SPEND?

Non-resident visitors spent approximately $2.4 billion during their stay in British Columbia in 1989. Of this total, 27% equivalent to $648 million, was attributed to lodging, see Exhibit 13. This sum likely includes other ancillary charges such as food purchased in the hotel, recreation and entertainment expenditures and gifts to hosts and hostesses, etc. (note: some 37% of visitor party-nights were spent with friends and relatives). The average amount spent on lodging, was $15.33 per person per day, see Table 10.

Expenditures on meals in restaurants were the next largest: 21% of all tourist spending was allocated to this item for an average of nearly $12.00 per person per day. A further 6% of tourist spending went on the purchase of groceries and beverages.

EXHIBIT 12 **ACCOMMODATION (PARTY NIGHTS)**

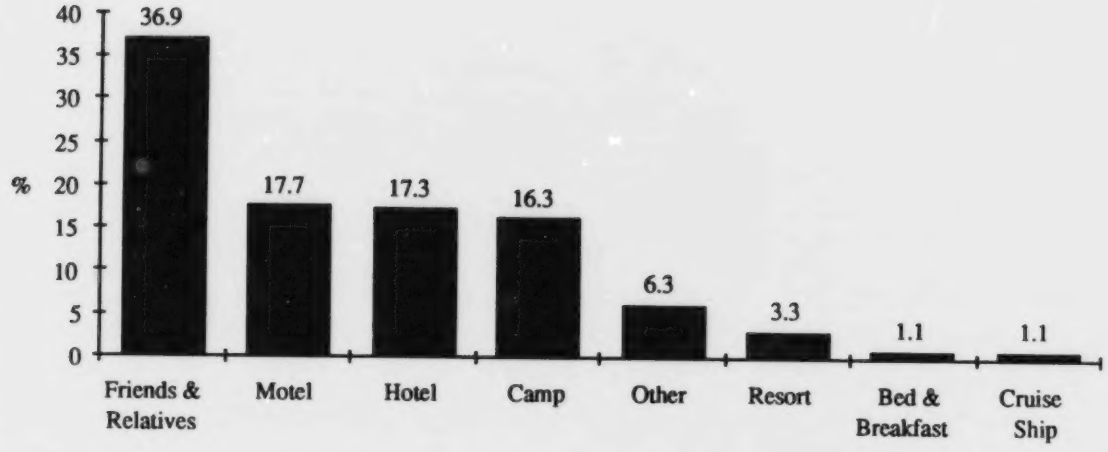


TABLE 9 **TOTAL NIGHTS AWAY FROM HOME**

Nights Away From Home This Trip		Total Nights in British Columbia	
# of Nights	**% of Parties**	**# of Nights**	**% of Parties**
One	5.0	One	11.7
Two	8.1	Two	15.8
Three	8.1	Three	15.2
Four	6.8	Four	11.5
Five – Seven	17.9	Five - Seven	20.5
Eight – Ten	14.8	Eight - Ten	11.0
Eleven – Fifteen	14.0	Eleven or more	14.3
Sixteen – Twenty	6.6		
Twenty one or more	18.7		
Average # of Nights	**14.09**	**Average # of Nights**	**5.84**

Transportation companies captured a 16% share of the revenue generated by non-resident visitors to British Columbia in 1989 and a further 8% was spent on packages and cruises.

The retail sector is a major beneficiary of the tourist dollar. 14 cents out of every tourist dollar is spent on shopping and souvenirs for a total of $340 million in 1989. A further 7% is spent on recreation and entertainment.

Spending patterns and amounts vary according to origin markets. Generally speaking, the further away visitors have come, the larger amounts they tend to spend per day. The biggest spenders are parties from "other U.S.A." who averaged $179 per party per day, and visitors from Ontario at $174 per party per day. Albertans, by contrast, spend half as much per party per day.

VISITORS' TRAVEL PATTERNS

First Trip to B.C.

The majority of non-resident tourists traveling in British Columbia in 1989 had, in fact, been to this Province before. We enjoy a high level of repeat business — as many as 79% reported this was a repeat trip (see Table 11). These repeat visitors reported having taken an average of 4.86 trips to B.C. over the past three years (see Table 12). As might be expected, most of these repeat visitors originate from the "close in' markets of Alberta and Washington.

Expo '86

As seen in Table 13, one out of every three visitor parties indicated that they had visited Expo 86.

Propensity to Travel on Business

Approximately one third of the non-resident visitor parties reported having taken at least one business trip any where in the world over the last 12 months (Table 14). Eighteen percent of the sample indicated they had taken more than four trips of less than 1000 miles in length and 12% reported taking more than four business trips which exceed 1000 miles.

EXHIBIT 13 **ALLOCATION OF TOURIST SPENDING**

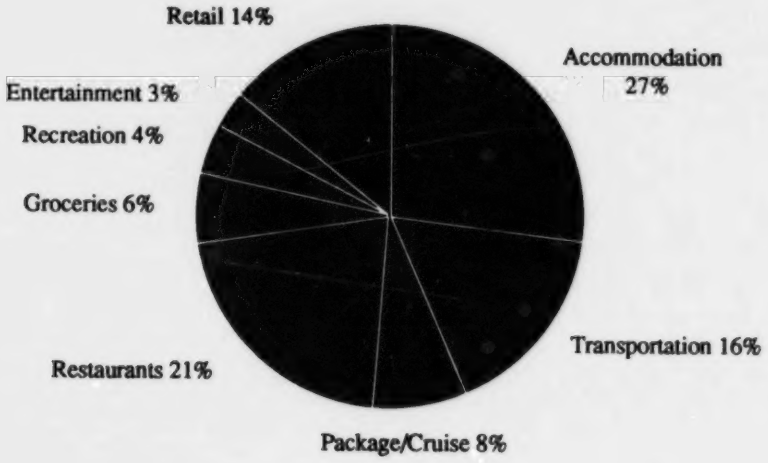


TABLE 10 **EXPENDITURES PER PARTY PER DAY**

Expenditures	per Party	%
Accommodation	$36.53	27
Auto Transportation	$15.22	11
Other Transportation	$6.53	5
Package/Cruise	$10.49	8
Restaurants	$28.64	21
Groceries/Beverage	$8.17	6
Recreation	$5.38	4
Entertainment	$3.91	3
Shopping/Souvenirs	$19.01	14
Sum of Expenditures	**$133.50**	**100**

TABLE 11 **FIRST VISIT TO B.C.?**

First Visit to B.C.	% of Parties
Yes	21.5
No	78.5

TABLE 12 **NUMBER OF TRIPS MADE TO B.C. IN THE LAST 3 YEARS**

# of Trips to B.C.	% of Parties
None	12.4
One	13.0
Two	18.6
Three	16.2
Four – Five	13.4
Six or more	26.3
Average # of Trips to B.C.	**4.86**

TABLE 13 **DID THEY VISIT EXPO?**

Visited Expo '86	% of Parties
Yes	38.4
No	61.6

TABLE 14 **FREQUENCY OF TRAVEL**

Frequency	Business Trips <1,000 miles %	Business Trips >1,000 miles %	Pleasure Trips <1,000 %	Pleasure Trips >1,000 %
None	66.9	68.3	36	40.5
One	6.0	10.1	13.1	29.6
Two	5.6	5.9	14.3	16.7
Three	3.5	3.3	10	7.1
Four – Five	5	4.5	12	4.2
Six – Ten	6.4	4.5	10.2	1.5
Eleven or more	6.7	3.4	4.4	0.4
Average # of Trips	**2.38**	**1.43**	**2.75**	**1.17**

TABLE 15 **TRAVEL INTENTIONS OVER THE NEXT TWO YEARS**

Destination Respondents Intend to Visit	%
British Columbia	55
Not Sure/No Vacation	46
U.S. (Other than CA, WA, and OR)	20
Canada (Other than AB, ON)	12
Other World	16
Europe	13
Alberta	12
California	11
Ontario	9
Hawaii	8
Other Sun Spots	7
Australia/New Zealand	6
Washington	5
United Kingdom	5
Alaska	4
Asia and Japan	3
Oregon	3

Propensity to Travel for Pleasure

British Columbia's visitors are frequent pleasure travellers. As many as 64% of respondents indicated they had taken at least one such trip of less than 1000 miles distance in the previous twelve months and 60% indicated that had made at least one pleasure trip that took them more than 1000 miles away from home. A further 14% of the respondents indicated they had taken 4 or more such trips in the last 12 months.

Future Travel Intentions

A sub sample of respondents, contacted as part of a telephone follow-up, were asked to indicate which destinations they intend to visit over the next two years. As Table 15 shows, 55% indicated that they would make a return visit to British Columbia. The three next most popular destinations named were Europe (13%), Alberta (12%) and California (11%). These results suggest that British Columbia has been relatively successful in achieving high levels of brand loyalty. The fact that 77% of our visitors are repeat visitors, suggests that there is considerable scope to attract new business into the province, i.e., to persuade "first timers" to make that initial trip. Furthermore, the fact that 55% of all our visitors intend to return again, indicates that these first timers will generate multiple trips.

Timing

Of the respondents who said they would return, 48% indicated they would come back in the summer. The next most popular season for future travel to British Columbia was the spring (28%). The winter and fall seasons have less appeal — only 7% and 9% respectively indicated they would return at this time of the year.

Activities of Interest

Respondents were provided with a list of activities and asked to indicate their level of interest in participating in each one on a subsequent trip to British Columbia. The activities are listed in order of importance, i.e., the percentage of respondents saying they were very interested, in Table 16. The publicity surrounding the Queen Charlottes Islands is evidenced by the fact that 76% of the sample indicated they wanted to visit that part of British Columbia. If all of these visitors were able to satisfy this interest then the annual volume of non-resident visitors could exceed 2.5 million persons per year for the next three years!

Since most visitors' expressions of interest do not convert into trips, they cannot be reliably used as a firm indicator of

demand. But the relative importance of each activity is of value. Interest in taking a heritage tour (70%) is very high, as is the interest in whale watching (64%). Nearly half the sample are interested in city-based activities such as a tour or attending a play or concert. Interest in more active pursuits such as fishing charters, staying at a guest ranch or whitewater rafting, was expressed by approximately 40% of the sample.

TABLE 16 ACTIVITIES MOST INTERESTED IN PARTICIPATING IN ON NEXT TRIP TO B.C.

Activity	%
Queen Charlotte Islands	76
Heritage Tour	70
Whale Watching	64
City Tour	56
Theatre or Concert	55
Winery Tour	48
Guided Hiking Tour	44
Fishing Charter	44
Stay at Guest Ranch	43
Whitewater Rafting	39
Gambling Resort	23

HOW DO THEY FIND OUT ABOUT B.C.?

Two out of three respondents confirmed that they had seen an advertisement for travel to British Columbia (Table 17).

Only 15% had requested more information about the province and of these only 48% had done so **prior** to making a decision to come to British Columbia. The remaining 52% had requested information after their trip decision in order to better plan for their trip.

The sub sample of respondents contacted in the telephone follow-up were asked to rank various sources of travel information in terms of their usefulness. The critical importance of "word of mouth" recommendations, as shown in Table 18, is evidenced by the fact that 85% of non-resident tourists consider this to be the best source of travel information and advice. Clearly, the importance of ensuring that our current visitors are served well is the best way of generating both repeat business and new business. Next in importance was a brochure received in the mail — as many as 59% of the sample rated this source as very useful. Travel agents were rated as very useful by 42% of the sample.

Print advertising was rated useful by more people (49%) than radio and T.V. advertising (32%).

TABLE 17 **HOW VISITORS FOUND OUT ABOUT B.C.**

	% of Parties	# of Parties
See Advertisements for Travel		
Yes	59.3	1.83 million
No	40.7	
Request for Information		
Yes	15.4	.476 million
No	84.6	
Timing of Request		
Before B.C. Decision	47.8	.228 million
After B.C. Decision	52.2	.248 million

TABLE 18 **SOURCES OF INFORMATION CONSIDERED MOST USEFUL**

Sources of Information	%
Friends and Relatives	85
Brochure in Mail	59
Newspaper/Magazine Ads	49
Travel Agent	42
Radio and TV Ads	32

WHAT DO THEY THINK ABOUT B.C.?

Adjectives Used to Describe B.C.

In order to identify British Columbia's image in the minds of its visitors, respondents were asked to tell what words came to mind when they thought of B.C. as a vacation destination. While the responses covered over 22 items/adjectives, the most frequent words and categories that were mentioned by more than 10% of those interviewed were as follows:

TABLE 19 **ADJECTIVES USED TO DESCRIBE B.C.**

Beautiful	24%
Scenic	28%
Mountains	19%
Friendly	16%
Generally Great	14%

Best and Worst Aspects

Respondents were also asked to indicate the best and worst aspects of their trip and the results were broken down by region of visit. As shown in Table 20, the best aspects that were mentioned more often for Vancouver than elsewhere were its food (13%) and, somewhat surprisingly, its surrounding wilderness (13%). Vancouver Island's mountains (16%), gardens (10%), its friendliness (20%) and shopping opportunities (10%) all received relatively more mentions than did the same items elsewhere in the province. The aspects of interior British Columbia that were most often cited as best were scenery (46%), lakes (12%), recreation (13%) and the outdoors (11%).

Fortunately, most of our guests appear to have satisfying experiences as the majority indicated that they could **not** name a "worst aspect". The only three worst aspects that were mentioned by more than five percent of the sample were weather (23% for Vancouver, 16% interior B.C. and 9% for Vancouver Island). Poor roads and road conditions were the only other negative aspects, but were mentioned by less than 10% of the sample.

TABLE 20 BEST ASPECTS OF VANCOUVER, VANCOUVER ISLAND AND OTHER PARTS OF B.C

Aspects	Greater Vancouver	Vancouver Island	Other B.C.
Scenery	18	25	46
Mountains	8	16	7
Lakes	4	6	12
Gardens	4	10	3
Fruits			3
Parks	1	3	5
Clean	3	5	2
Weather	15	9	28
Family	19	7	19
Friendly	15	20	19
Culture	2	2	0
Recreation	1	9	13
Food	13	8	10
Accommodation	2	3	6
Shopping	6	10	3
Campgrounds			7
Wilderness	13	1	3
Outdoors	0	3	11
Relaxing	6	0	7
Touring			4
Stanley Park	9		
Gastown	1		
Chinatown	1		
Grouse Mtn.	1		
Queen Elizabeth Park	1		
Other Vancouver Attractions	4		
Generally Pretty	6	2	
Butchard Gardens		13	
Parliament Buildings		4	
Museums	1	6	
Tour of Victoria		3	
Other Van. Island Attractions		3	
Ferry		2	

VISITORS' PERSONAL CHARACTERISTICS

Party Size and Composition

The most common travel parties consisted either of two adults (47%) or one adult travelling alone (23%), see Table 21. Most of the latter were travelling for business reasons. Parties that included children accounted for only 15% of the total sample. Relatively few visitors to British Columbia were travelling as part of a large group — only 2% were in parties of eleven or more persons. The average party size for visitors to the province as a whole was 2.47.

Age

British Columbia appears to appeal to a wide spectrum of age groups. The majority of respondents were in the age group noted for its propensity to travel: 22% of all respondents reported being in the 35-44 age bracket. The seniorsmarket has long been recognized as an important one for British Columbia — 31% of the respondents were over the age of 55. The age composition of visitors varied considerably from one origin to another — American visitors, especially from Other U.S. and Other West U.S. states, tended to be older than Canadian visitors.

Household Income

British Columbia attracts a relatively affluent traveller. The average household income of parties visiting B.C. was nearly $45,000 and as many as 31% reported household incomes in excess of $60,000.

TABLE 21 **PERSONAL CHARACTERISTICS**

	% of Parties
Party Composition	
1 Adult	21.6
2 Adults	46.9
3 Adults	6.1
4+ Adults	9.8
Adult & 1-2 Child	13.1
Adult & 3+ Child	2.4
Party Size	
One Person	23.2
Two	47.1
Three	9.7
Four	12.1
Five-Ten	6.4
Eleven or More	1.5
Average Size of Party	**2.47 Persons**
Age	
15-18	1.6
19-24	5.7
25-34	19.9
35-44	22.4
45-54	18.3
55-64	18.7
65 and over	13.3
Income	
Under $20,000	12.5
$20 - 39,999	31.6
$40 - 59,999	25.0
$60,000 +	30.9
Average Household Income	**$44,966/Party**
Gender	
Male	48.7
Female	51.3

Variations by Origin

PROFILE OF CANADIAN VISITORS

Canadian Parties

Canadian visitors contributed 53% of total revenue from non-resident tourists to British Columbia in 1989, but accounted for only 48% of all parties (see Exhibit 14). This is because Canadians tended to spend longer in the province than other origin groups.

There is considerable variation in travel patterns, spending behaviour and party characteristics within the Canadian market. Exhibit 15 gives a breakdown of tourist spending in B.C. by Canadians.

Alberta

- Albertans stay an average of 5.9 nights, but spend only $98 per party, per night, an amount that is 27% less than the average for all visitors and nearly half what visitors from Ontario spend (see Table 22).
- As many as 15% stated their main purpose to be a resort vacation and 9% described their trip as an outdoors or wilderness trip.
- Albertans appear to spend time in more regions of the province than do visitors from other parts of Canada — 21% of the bed nights spent by Albertans were spent in the B.C. Rockies and another 25% were spent in the Okanagan-Similkameen, High Country and Kootenay regions combined.
- Albertans are least likely to be travelling on business (16%) and most likely to be visiting friends and relatives who also provide the preferred form of accommodation. Motels and campgrounds are the next preferred places to stay with each category capturing an 18% share of the Albertan market.
- The Albertan market is still very much a "rubber tire" market with over 74% arriving via car or camper.
- Of the three Canadian markets, it is the most seasonal — 30% of all Albertan visits are made in July and August.
- The typical Albertan travel party consists of adults travelling with children (23%) or an adult couple (42%).

EXHIBIT 14 **SHARE OF TOURIST SPENDING IN BRITISH COLUMBIA**

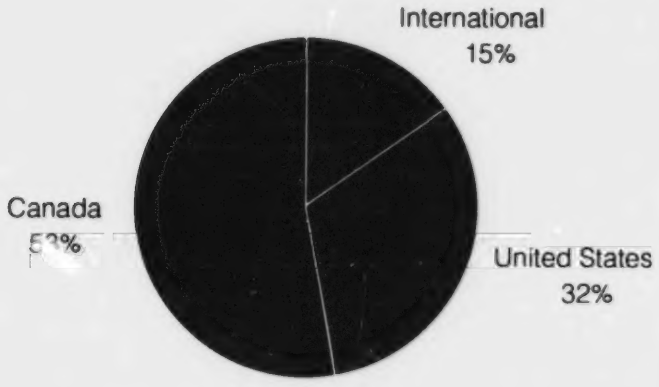


EXHIBIT 15 **PROVINCIAL SHARE OF CANADIANS SPENDING IN BRITISH COLUMBIA**

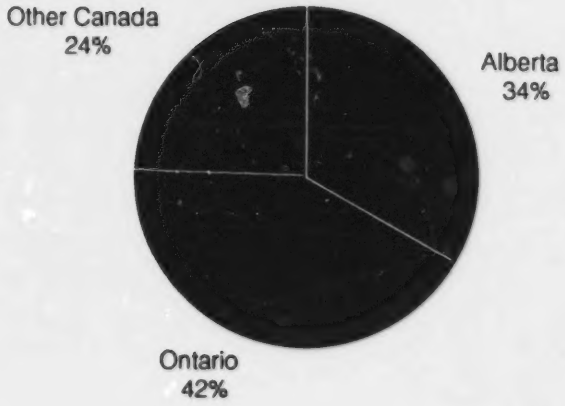


TABLE 22 **PROFILE OF CANADIAN VISITORS**

	Alberta	Ontario	Other Canada
Expenditures			
Length of Stay (Nights)	5.9	7.8	7.3
Party Size (Persons)	2.5	2.0	2.4
Expenditure Per Party/Day	$98.0	$174.0	$119.0
Main Trip Purpose			
Friends, Relatives, Personal	45%	37%	45%
Business Related	16%	39%	28%
Touring Trip	12%	11%	14%
Resort Vacation	15%	4%	5%
Top Four Regions Visited			
Greater Vancouver	27%	56%	50%
Southwestern B.C.	8%	13%	12%
Okanagan-Similkameen	14%	4%	6%
Victoria	6%	10%	7%
Party Composition			
Single Adult	21%	42%	31%
Couple	42%	38%	39%
Over 3 Adults	14%	13%	16%
Adults & Children	23%	8%	14%

- Our visitors from Alberta are loyal, repeat customers — 99% have visited B.C. before, with as many as 78% having made at 3 trips or more over the past three years.

Ontario

- Visitors from Ontario are an attractive market segment for British Columbia because of their tendency to stay a long time in the province — 7.8 days as opposed to 5.8 for non-resident visitors as a whole.
- Ontario visitors account for 13% of all visitor parties but as much as 22% of all revenue.
- They also outspend most other visitors on a per capita and per day basis: average spending per party-day was $174 and on a per person,per-day basis was $84 — the highest recorded for all non-resident markets.
- These expenditure patterns reflect the fact that many visitors from Ontario are visiting the province for business reasons, and they tend to confine their stay to expensive urban centres: 39% of the Ontario sample was travelling for business and 66% of the party-nights they spent in the province were spent in either Vancouver or Victoria.
- Of all visitors to B.C., they were most likely to stay in a hotel (24%) but less likely than average to use motels (11%) and resorts(4%). As many as 49% stayed with friends and relatives.
- The overwhelming majority of Ontarian visitors arrived by air, 90%, with 41% then using a rental car to travel around the province. Domestic air services were only used by 7% of this segment.
- In contrast to Albertan parties, the typical Ontario visitor party consisted of one adult (42%) or two adults (38%). Only 7% of all parties included children.

Other Canadian Visitors

- Visitors from other parts of Canada make up 12% of all parties and 13% of revenue.
- While they tend to stay in B.C. almost as long as their counterparts from Ontario, i.e., 7.3 nights, their expenditures are somewhat lower: $50 per person-per night.
- Although business is the primary motivator for 28% of

them, 45% had come to B.C. in order to visit friends and relatives, 14% were on a touring trip and 5% had come for a resort vacation.

- Visitors from other parts of Canada still spent as much as half their time in Vancouver, showing a tendency to visit more regions of the province than Ontarians, but fewer regions than Albertans.
- While a 35% share of the bed-nights generated by visitors from other parts of Canada were captured by commercial lodging establishments, 51% of all party-nights were spent in the homes of friends and relatives.
- A larger portion of visitors from "other Canada" were taking extended vacations and including British Columbia as part of a larger itinerary: 35% had driven into the Province, 66% flew direct.
- The average party-size was slightly larger than that recorded for visitors from Ontario, because a larger proportion were travelling in groups of 3 or more adults. This market segment also had a higher proportion of persons aged 65 or more (13%).

PROFILE OF AMERICAN VISITORS

American Parties

While American visitors accounted for 42% of all parties, they contributed only 32% of the total revenue spent by non-resident tourists to British Columbia in 1989. This is because Americans tended to spend less time in the province than other origin groups, see Exhibit 16.

Washington

- While visitors from Washington made up 14% of the parties to B.C. in 1989, they contributed only 7% of the revenue due to a combination of short stays (3.2 nights) and low expenditures, $47.33 per person-day (see Table 23).
- Of all the visitor parties, Washingtonians are most likely to be making a city trip (11%). Touring trips are also popular at 25%, as are outdoors trips and resort vacations at 11% each.

EXHIBIT 16 **SHARE OF TOURIST SPENDING IN BRITISH COLUMBIA**

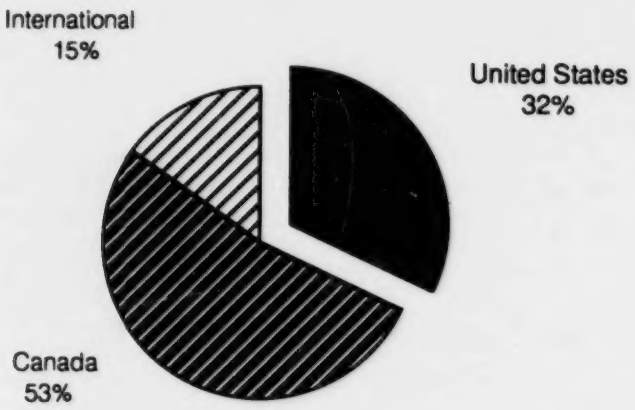


TABLE 23 **PROFILE OF U.S. VISITORS**

	Washington	Oregon	California	Other W. US	Other US
Expenditures					
Length of Stay (Nights)	3.20	4.20	5.00	4.40	4.40
Party Size (Persons)	2.57	2.66	2.45	2.66	2.78
Expenditure Per Party/Day	$122.00	$115 .00	$148 .00	$136.00	$179.00
Main Trip Purpose					
Friends, Relatives, Personal	26%	21%	23%	21%	16%
Business Related	9%	8%	6%	11%	12%
Touring Trip	25%	35%	43%	45%	50%
Resort Vacation	11%	7%	7%	5%	3%
City Trip	11%	6%	3%	3%	3%
Outdoors/Wilderness	11%	15%	8%	10%	8%
Top Four Regions Visited					
Greater Vancouver	25%	22%	33%	28%	28%
Southwestern B.C.	15%	8%	11%	6%	6%
Victoria	16%	21%	23%	18%	16%
High Country	8%	10%	4%	5%	8%

- Motels and campgrounds are the preferred form of accommodation, capturing 22% and 23% respectively. Another 22% stayed with friends and relatives. This pattern would partially explain the relatively low expenditures by this market.
- The Washington market, as might be expected given its proximity to B.C., is very much a "rubber tire" market with over 95% of the visitor parties arriving by car or camper.

Oregon

- British Columbia welcomed approximately 328,776 residents of Oregon to the province, whose combined expenditures contributed 3% of total revenue.
- This market is most interested in touring (35%) and taking an outdoors adventure trip (15%).
- Oregonians are keen campers — 37% of the party-nights spent in B.C. were spent in campgrounds and 17% of the parties from Oregon arrived in an R.V. As a consequence, expenditures on accommodation were the lowest recorded for all visitor markets.
- Perhaps in reflection of their outdoors orientation, the Oregon market is more seasonal than others — 46% came in the peak summer months of July and August.

California

- In 1989, over 681,345 Californians visited British Columbia and spent an average of 5 days in the province. They contributed approximately $216 million in direct revenue, equivalent to a 9% share.
- Their travel patterns around the province differed from the average, in that they showed a greater propensity to visit Victoria and Vancouver Island than visitors from elsewhere in the United States. On the other hand, regions such as Kootenay Country, B.C. Rockies, and Cariboo-Chilcotin have not had as much success in attracting Californians.
- The majority of Californians had come to B.C. in order to tour (43%) and participate in activities such as sightseeing (57%) and visiting gardens and parks (25%) were especially popular.
- 70% of this market drove to B.C. in a car or camper and 31% arrived by air. Since 18% arrived in their recreational

vehicle, campgrounds captured a disproportionate share of the bed-nights generated by this market (29%). Motels and hotels were also popular — catering to 20% and 19% of the bed-nights respectively.

- The preferred season for travel was summer — 41% of all Californian trips were made in July and August and only 9% took place over the winter.
- For as many as 33% of the Californian visitors, this was their first trip to British Columbia.
- The Californian visitor tends to be older than average: 44% were over 55 years of age compared to 32% of the visitor population as a whole.

Other West U.S.

- In recent years, the number of visitors to B.C. from "other western" states such as Montana, Wyoming, Texas and Arizona, has steadily increased and in 1989 over 657,552 visitors came from this region, and spent $120 million during a stay which averaged 4.4 nights.
- Touring was their prime reason for coming — 45% gave this as their main trip purpose and a further 10% described their trip as an outdoors trip.
- Of all the U.S. markets this one showed the greatest propensity to use motels — 30% of their bed-nights were spent in this form of lodging and next in popularity were campgrounds.
- Unlike their Californian neighbours, visitors from other western states were less likely to arrive by air — only 19% reported flying to B.C., but were more likely to report using a rental car. Some of the respondents who reported using air transport to get to B.C. may have flown to Seattle and Spokane and then rented a car.

Other U.S. States

- Thanks to the exposure afforded British Columbia by Expo '86 and the expanding cruise industry along the inside passage to Alaska, awareness of B.C. in the eastern part of the United States has increased in recent years. In 1989, 601,314 person-trips were made by residents of U.S. states other than the ones described above.
- This market is attractive because their average expenditures are the highest of all American markets — $66 per

person-day. Overall expenditures could, however, be substantially increased by increasing their length of stay from 4.4 nights to the overall visitor average of 5.84 nights.

- While Vancouver and Victoria are popular destinations with this market, the surrounding regions of Southwestern B.C. and Vancouver Island have not yet managed to attract their share of visitors from this market. Since many are heading north to Alaska, the regions of North by Northwest and Peace River-Alaska highway both attract a disproportionate share of visitors from Eastern U.S.
- Touring was the main purpose cited by as many as 50% of visitors from this region and, as a consequence, activities such as sightseeing (58%), shopping (41%), visiting museums and historic sites (27%) and gardens and parks (30%) all enjoyed above average participation by this segment.
- Of all the U.S. visitors, visitors from "other U.S." states (Eastern U.S.A.) were the most likely to stay in a hotel (24%) and they spent the most per person, per day on lodging ($22.17). They were also the most likely to have arrived in B.C. by air (38%) and or rental car (24%).
- Visitors from "other U.S." states represent a new market for British Columbia — for as many 58% this was their first trip and only 14% reported having visited Expo '86 three years ago. Because B.C. is such a new destination, a higher proportion were inclined to purchase a package tour — 15% compared to 6% for the sample as a whole — and nearly one in every three parties had requested tourism information prior to their arrival.

PROFILE OF INTERNATIONAL VISITORS

International Parties

- Overseas visitors accounted for only 10% of all party visits in 1989, but they contributed 15% of the total non-resident tourist revenue, see Exhibit 17.
- Visitors travelling from overseas destinations stay in British Columbia 8.4 days, longer than all other visitors. They travel in an average party size of 2.5 persons and spend an average of $57.78 per person per day, see Table 24.

- The most popular destination for overseas visitors was Greater Vancouver (45%); Vancouver Island and other Parts of Southwestern B.C. each captured 10% of this market in 1989.
- The overseas traveller visited British Columbia primarily to take a touring trip (39%) or to visit friends and relatives (33%). Conferences and other business travel were the primary motivation for 12% of all overseas visitors.

EXHIBIT 17

SHARE OF TOURIST SPENDING IN B.C. MADE BY INTERNATIONAL VISITORS

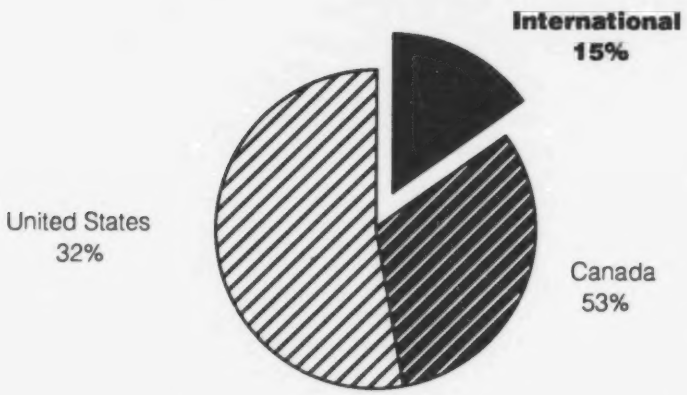


TABLE 24 **PROFILE OF INTERNATIONAL VISITORS**

	International Visitors
Expenditures	
Length of Stay (Nights)	8.4
Party Size (Persons)	2.5
Expenditure Per Party/Day	$145.0
Main Trip Purpose	
Friends, Relatives, Personal	33%
Business Related	12%
Touring Trip	39%
Outdoors	8%
Resort Vacation	4%
City Trip	3%
Top Four Regions Visited	
Greater Vancouver	25%
Southwestern B.C.	15%
Victoria	16%
High Country	8%

TABLE 25

VARIATIONS BY ORIGIN — TOURISTS

	Alberta	Ontario	Other Can.	Washington	Oregon	California	Other W. US	Other US	Overseas	Total
Parties	710,700	401,700	370,800	432,600	123,600	278,100	247,200	216,300	309,000	3,090,000
Share %	23%	13%	12%	14%	4%	9%	8%	7%	10%	100%
Party Nights	4,500,000	3,060,000	2,700,000	1,440,000	540,000	1,440,000	900,000	1,080,000	2,520,000	18,000,000
Share %	25%	17%	15%	8%	3%	8%	5%	6%	14%	101%
Party-Size	2.52	2.04	2.37	2.57	2.66	2.45	2.66	2.78	2.5	2.47
Person Nights	11,340,000	6,242,400	6,399,000	3,700,800	1,436,400	3,528,000	2,394,000	3,002,400	6,300,000	43,700,000
Length of Stay in B.C. (days)	5.9	7.8	7.3	3.2	4.2	5	4.4	4.4	8.4	5.83
Visitors = Person Trips	1,790,964	819,468	878,796	1,111,782	328,776	681,345	657,552	601,314	772,500	7,630,000
Expenditure per Party per Day	$98.41	$174.46	$119.12	$122.04	$115.31	$147.76	$136.38	$179.34	$144.96	$133.50
Expenditure per Person per Day	$39.41	$84.13	$50.00	$47.33	$43.01	$60.59	$52.60	$65.94	$57.78	$54.90
Gross Revenue (millions)	$432,000,000	$528,000,000	$312,000,000	$168,000,000	$72,000,000	$216,000,000	$120,000,000	$192,000,000	$360,000,000	$2,400,000,000
Share %	18%	22%	13%	7%	3%	9%	5%	8%	15%	100%
Region Visited (Party-Nights)										
Vancouver Island	7	7	6	8	9	11	9	5	10	8
S.W.B.C.	8	13	12	15	8	11	6	6	10	11
Ok.-Simil	14	4	6	9	7	4	7	4	6	8
Kootenay	3	1	3	1	3	0	1	1	1	2
High Country	8	2	3	8	10	4	5	8	7	6
Cariboo-Chilcotin	1	0	1	5	5	3	2	1	2	2
North by Northwest	3	1	3	4	7	5	8	9	5	4
Peace River	2	1	1	3	3	4	6	6	1	2
B.C. Rockies	21	4	9	7	5	3	10	5	4	9
Greater Victoria	6	10	7	16	21	23	18	16	9	11
Greater Vancouver	27	56	50	25	22	33	28	39	45	39
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
Main Purpose (Parties)										
Conference	6	9	13	5	3	2	5	6	6	6
Other Business	10	30	15	4	5	4	6	6	6	11
Visit Friends/Relatives/Personal	45	37	45	26	21	23	21	16	33	33
Touring Trip	12	11	14	25	35	43	45	50	39	26
City Trip	1	2	2	11	6	3	3	3	3	3
Outdoors/Wilderness/Adventure	9	4	5	11	15	8	10	8	8	8
Resort Vacation	15	4	5	11	7	7	5	3	4	8
Other	3	3	2	8	7	10	6	8	2	5
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

	Alberta	Ontario	Other Can.	Washington	Oregon	California	Other W. US	Other US	Overseas	Total
Activities (Party-Nights)										
Conf./Conv	1	2	2	2	1	1	2	2	1	2
Corp Meeting	2	4	4	1	0	1	0	1	1	2
Trade Show	0	1	0	0	0	0	0	0	0	0
Sporting Event	3	1	3	4	3	1	2	1	2	2
Festival/Cultural	5	4	6	6	5	3	4	4	4	5
Other	1	1	0	1	1	1	2	1	1	1
Went Shopping	32	33	35	37	38	41	33	41	39	36
Took a Tour	5	7	6	6	9	11	10	15	16	9
Sightseeing	32	34	35	44	50	57	58	58	50	42
Passing Through	17	10	13	20	27	23	22	22	17	17
Conduct Business	11	20	12	6	7	4	7	7	4	10
Other Outdoor	27	15	18	27	25	23	18	26	23	23
Skiing	4	7	5	3	1	2	2	3	3	4
Other Sporting	15	9	12	13	12	9	9	8	13	12
Nightlife	11	13	13	11	7	9	7	10	11	11
Other	2	2	2	2	2	2	3	2	2	2
Beach Lakeshore	22	18	17	25	25	24	20	17	27	21
Museum/Historic	7	10	11	16	21	24	23	27	16	14
Fair/Amusement Park	3	2	3	3	3	3	3	3	3	3
Gardens/Parks	13	18	13	21	23	25	26	30	28	20
Friends & Relatives	46	48	53	23	20	24	17	15	26	37
Other	2	1	1	2	2	2	2	1	2	2
TOTAL	**261**	**260**	**264**	**273**	**282**	**290**	**270**	**294**	**289**	**275**
Accom. (Party-Nights)										
Hotel	10	24	20	16	9	19	15	24	19	17
Motel	18	11	13	22	27	20	30	29	16	18
Resort	3	4	2	7	2	4	3	3	1	3
Bed & Breakfast	1	1	1	2	2	1	1	2	2	1
Trailer/Tent/Camper	18	4	6	23	37	29	28	20	17	16
Cruise Ship	0	2	1	0	1	3	2	2	1	1
Friends & Relatives	42	49	51	22	16	20	12	16	38	37
Other	7	4	5	9	7	4	9	4	6	6
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
Expenditures (Per Person/Per Day)										
Accommodation	$10.05	$23.19	$13.09	$14.17	$11.78	$16.57	$14.96	$22.17	$17.39	$15.33
Auto Transport	$5.49	$8.20	$6.02	$4.03	$5.66	$6.36	$7.72	$6.87	$6.36	$6.25
Other Transport	$1.34	$3.69	$2.62	$2.37	$2.51	$3.60	$2.83	$3.10	$3.50	$2.67
Package/Cruise	$1.66	$7.68	$2.80	$2.95	$4.03	$6.53	$4.35	$9.20	$4.28	$4.30
Restaurants	$9.36	$19.03	$11.38	$10.71	$8.38	$12.16	$11.06	$13.89	$10.58	$11.89
Groceries/Bev	$3.02	$5.18	$3.16	$2.63	$2.81	$3.45	$2.51	$2.29	$3.73	$3.35
Recreation	$2.09	$2.50	$2.13	$2.18	$1.77	$2.93	$2.37	$2.96	$1.86	$2.26
Entertainment	$1.19	$2.34	$1.75	$1.29	$0.66	$1.22	$1.01	$1.40	$1.90	$1.58
Shopping/Souvenirs	$4.83	$12.28	$8.22	$7.07	$5.55	$8.64	$6.56	$8.09	$9.02	$7.79
Other	$1.61	$3.57	$1.26	$1.47	$1.27	$1.82	$1.69	$1.34	$2.82	$1.99
TOTAL	**$39.41**	**$84.31**	**$50.00**	**$47.33**	**$43.01**	**$60.59**	**$52.60**	**$65.94**	**$57.78**	**$54.90**

	Alberta	Ontario	Other Can.	Washington	Oregon	California	Other W. US	Other US	Overseas	Total
Transport to B.C. (Party)										
Own Auto	61	8	29	83	75	45	53	22	9	44
Rent Auto	1	3	3	1	3	7	11	24	16	6
Own Camper	12	2	3	11	17	18	19	13	3	10
Bus	1	2	2	0	3	2	2	4	7	2
Air	29	90	66	2	6	31	19	38	74	42
Train	0	0	1	0	0	1	1	2	2	1
Cruise	0	0	1	1	1	4	2	6	1	1
Ferry	2	3	1	14	21	16	14	18	7	8
Other	2	1	1	1	2	1	1	3	1	2
TOTAL	**108**	**110**	**108**	**114**	**127**	**124**	**122**	**128**	**118**	**115**
Transport in B.C. (Party)										
Own Auto	63	9	32	76	71	43	55	21	11	44
Rent Auto	11	41	24	2	5	21	18	39	35	21
Own Camper	12	2	3	11	15	18	19	14	5	10
Bus	5	18	17	3	4	11	8	12	28	11
Air	1	7	5	1	2	3	3	2	9	4
Train	1	2	3	1	1	3	2	4	9	2
Cruise	0	3	2	0	1	3	2	3	3	2
Ferry	12	18	18	10	15	18	14	14	23	15
Other	16	38	32	6	6	12	5	14	29	19
TOTAL	**119**	**139**	**135**	**111**	**119**	**130**	**125**	**122**	**151**	**127**
Gender (Party)										
Male	47	54	48	47	40	44	43	50	60	49
Female	53	47	52	53	60	56	58	50	40	51
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
Age (Party)										
15-18	2	2	3	1	2	1	1	1	2	2
19 -24	8	8	6	3	3	2	4	2	10	6
25 -34	23	25	21	18	15	15	16	11	23	20
35 - 44	25	21	25	23	25	22	23	18	19	23
45- 54	19	20	19	20	19	15	17	17	17	18
55 - 64	15	17	14	19	18	27	24	28	17	19
65 and over	9	7	13	16	18	17	16	24	12	13
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
Season (Party-Nights)										
Winter	26	27	27	22	7	9	10	7	18	20
Spring	23	25	24	28	20	24	26	25	31	25
Summer	30	23	21	25	46	41	46	45	29	31
Fall	22	25	28	26	27	26	18	23	22	24
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

	Alberta	Ontario	Other Can.	Washington	Oregon	California	Other W. US	Other US	Overseas	Total
First Visit to B.C.? (Party)										
No	99	82	86	96	88	67	65	42	38	79
Yes	1	18	14	4	12	33	35	58	62	22
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
Average # of Trips to B.C. in Past 3 Years (Party)										
None	4	17	9	6	15	29	27	31	24	13
1	6	15	13	10	20	21	23	20	24	13
2	12	18	22	17	25	27	23	28	24	19
3	17	18	17	18	15	9	15	13	11	16
4 to 5	17	14	16	15	11	6	6	2	9	13
6 or More	44	19	22	34	14	9	6	6	7	26
TOTAL										
Visted Expo '86 Last Year (Party)										
No	51	61	60	50	60	74	83	86	82	62
Yes	49	39	40	51	40	26	18	14	18	38
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
Package Tour? (Party)										
No	99	95	94	97	96	92	96	86	85	94
Yes	1	5	6	3	4	8	4	15	15	6
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
Saw Ads for Treavel to B.C.? (Party)										
No	36	43	53	30	26	31	48	49	58	42
Yes	64	57	47	70	74	69	52	51	43	59
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
Requested Info from Tourism B.C. (Party)										
No	89	90	91	88	84	77	80	73	75	85
Yes	11	11	9	12	16	23	20	27	25	15
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
Timing of Request (Party)										
Before	44	50	47	49	50	53	39	58	44	48
After	56	50	54	51	50	47	61	42	56	52
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

Variations by Region

The following tables provide a summary of those visitors to each region. Eleven regional reports are available from the Ministry of Tourism which provide a comprehensive market profile of non-resident travellers to each region.

TABLE 26

VARIATIONS BY REGION — TOURISTS

	Vancouver Island	S.W.B.C.	Ok.- Simil	Kootenay	High	Cariboo-Chil	N by NW	Peace River	Rockies	Victoria	Vancouver	Total
Parties	339,900	494,400	401,700	123,600	494,400	123,600	185,400	123,600	525,300	710,700	1,668,600	3090000
Share %	11%	16%	13%	4%	16%	4%	6%	4%	17%	23%	54%	168%
Party-nights	1,440,000	1,980,000	1,440,000	360,000	1,080,000	360,000	720,000	360,000	1,620,000	1,980,000	7,020,000	18,000,000
Share %	8%	11%	8%	2%	6%	2%	4%	2%	9%	11%	39%	102%
Party-Size	2.48	2.55	2.6	2.59	2.6	2.5	2.44	2.84	2.78	2.65	2.25	2.47
Person-nights	3,571,200	5,049,000	3,744,000	932,400	2,808,000	900,000	1,756,800	1,022,400	4,503,600	5,247,000	15,795,000	44,460,000
Length of Stay in B.C.	9.66	7.84	7.65	7.4	7.63	9.23	9.31	7.07	5.66	6.43	6.39	5.83
Length of Stay in Region	3.70	3.53	3.08	2.91	2.03	2.47	3.77	2.95	3.02	2.59	3.85	
Visitors = Person-Trips	842,952	1,260,720	1,044,420	320,124	1,285,440	309,000	452,376	351,024	1,460,334	1,883,355	3,754,350	7,632,300
Expenditure per Party per Day	$113.84	$140.99	$93.83	$76.04	$103.06	$87.57	$121.91	$109.32	$102.22	$165.69	$156.83	$133.50
Expenditure per Person per day	$46.25	$52.04	$36.14	$29.09	$39.38	$34.80	$49.54	$36.81	$35.75	$64.62	$74.58	$54.90
Gross Revenue (millions)	$168,000,000	$264,000,000	$120,000,000	$24,000,000	$120,000,000	$24,000,000	$96,000,000	$48,000,000	$168,000,000	$312,000,000	$1,080,000,000	$2,400,000,000
Share %	7%	11%	5%	1%	5%	1%	4%	2%	7%	13%	45%	101%
Origin (Party Nights)												
Alberta	21	19	44	45	35	17	19	18	54	14	17	25
Ontario	15	22	10	10	7	5	6	7	8	17	25	17
Other Canada	12	17	12	21	8	6	10	6	14	9	19	15
Washington	8	12	9	5	11	27	8	10	6	12	5	8
Oregon	3	2	3	5	5	8	5	4	1	5	2	3
California	11	8	4	1	5	12	10	14	2	16	6	8
Other West US	6	3	5	4	5	7	11	17	6	9	4	5
Other U.S.A	4	3	3	2	7	4	12	17	3	8	6	6
Overseas	19	13	12	9	17	16	19	7	6	11	17	14
TOTAL	100	100	100	100	100	100	100	100	100	100	100	100
Main Purpose (party)												
Conference	4	7	2	2	2	1	2	1	2	3	11	8
Other Business	8	7	6	8	4	5	5	6	5	7	18	12
Visit Friends and Relatives/Personal	39	45	48	42	39	31	34	29	34	29	36	38
Touring Trip	39	31	36	38	43	44	49	59	44	51	27	31
City Trip	1	0	1	0	1	0	2	0	0	6	5	4
Outdoors Trip	10	11	7	11	12	19	8	5	15	4	3	7
TOTAL	100	100	100	100	100	100	100	100	100	100	100	100

	Vancouver Island	S.W.B.C.	Ok.- Simil	Kootenay	High	Cariboo-Chil	N by NW	Peace River	Rockies	Victoria	Vancouver	Total
Activities (party nights)												
Conf./Conv	0	3	1	0	0	0	0	0	1	1	3	2
Corp Meeting	1	1	0	0	0	1	1	0	0	1	4	2
Trade Show	0	0	0	0	0	2	0	0	0	0	1	0
Sporting Event	3	4	3	1	1	4	1	2	4	1	2	2
Festival/Cultural	4	4	6	3	2	2	3	3	4	5	6	5
Other	0	1	1	0	1	0	0	3	1	1	1	1
Went Shopping	31	34	36	24	24	20	27	26	29	48	42	37
Took a Tour	8	6	8	8	7	7	9	6	5	16	9	9
Sightseeing	46	34	33	41	38	32	42	37	38	65	42	42
Passing Through	18	16	19	23	39	33	37	39	20	11	8	16
Conduct Business	8	6	5	5	3	5	3	8	4	7	19	11
Other Outdoor	37	26	26	23	30	43	26	21	40	16	14	22
Skiing	0	15	4	8	1	0	2	0	11	0	1	4
Other Sporting	14	17	13	16	14	14	13	18	22	6	9	12
Nightlife	6	13	8	4	3	2	5	6	9	11	17	12
Other	1	3	2	2	1	3	1	2	3	2	2	2
Beach Lakeshore	46	18	36	27	24	24	16	16	12	23	19	22
Museum/Historic	13	7	7	11	11	14	15	26	11	35	13	14
Fair/Amusement Park	1	2	5	1	2	1	2	2	3	4	4	3
Gardens/Parks	17	13	12	14	12	8	10	7	14	38	25	20
Friends & Relatives	35	42	50	42	24	23	27	27	25	30	43	37
Other	1	1	1	1	2	3	1	0	2	2	2	2
TOTAL	**290**	**266**	**276**	**254**	**239**	**241**	**241**	**249**	**258**	**323**	**286**	**277**
Accom. (party nights)												
Hotel	3	13	3	2	4	2	4	3	5	25	32	18
Motel	21	11	23	26	31	14	16	21	26	30	11	18
Resort	7	10	2	0	4	6	0	1	10	0	0	3
Bed & Breakfast	2	1	1	1	0		2		0	4	1	1
Trailer/Tent/Camper	24	15	22	26	33	48	38	53	28	9	3	16
Cruise Ship	1				1		2		0	1	0	1
Friends & Relatives	37	43	44	35	21	22	29	21	20	27	48	38
Other	6	7	5	10	7	9	10	2	10	3	4	5
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
Expenditures (Person/Day)												
Accommodation	$10.75	$13.68	$8.75	$6.18	$11.91	$6.20	$7.35	$6.79	$11.39	$21.53	$22.70	$15.33
Auto Transport	$6.09	$5.35	$5.53	$6.18	$8.58	$8.61	$10.32	$12.46	$4.87	$4.23	$5.82	$6.25
Other Transport	$4.93	$1.18	$0.84	$0.14	$0.47	$2.07	$3.36	$0.44	$0.12	$5.98	$3.48	$2.67
Package/Cruise	$3.68	$5.98	$0.76	$1.55	$2.91	$5.05	$10.57	$5.95	$2.47	$3.49	$2.60	$4.30
Restaurants	$8.51	$10.68	$8.02	$6.23	$7.17	$4.47	$7.63	$6.03	$7.49	$14.06	$17.95	$11.89
Groceries/Bev	$3.56	$3.38	$3.57	$3.65	$3.29	$3.07	$4.24	$3.02	$3.34	$2.04	$4.07	$3.35
Recreation	$3.01	$4.62	$2.15	$1.40	$1.07	$1.76	$0.70	$0.72	$2.61	$2.33	$2.04	$2.26
Entertainment	$1.26	$1.47	$0.77	$0.51	$0.64	$0.70	$0.50	$0.37	$1.09	$1.29	$2.74	$1.58
Shopping/Souvenirs	$4.60	$7.29	$5.39	$2.34	$3.35	$2.55	$4.56	$1.84	$2.62	$10.69	$12.95	$7.79
Other	$1.75	$1.46	$1.36	$1.30	$1.75	$1.49	$2.04	$1.22	$1.23	$2.10	$3.00	$1.99
TOTAL	**$46.25**	**$52.04**	**$36.14**	**$29.09**	**$39.38**	**$34.80**	**$49.54**	**$36.81**	**$35.75**	**$64.62**	**$74.58**	**$54.90**

VARIATIONS BY REGION

	Vancouver Island	S.W.B.C.	Ok.- Simil	Kootenay	High	Cariboo-Chil	N by NW	Peace River	Rockies	Victoria	Vancouver	Total
Major Destination this Trip												
BC	82	79	80	77	65	53	55	38	71	71	74	73
Alberta	4	6	7	9	13	8	5	7	15	4	5	6
Rest of Canada	3	3	2	2	6	5	5	7	3	3	5	4
Alaska	4	2	1	1	4	24	30	42	2	4	4	5
Washington	2	3	3	2	4	2	1	2	2	7	3	4
Rest of USA	3	5	5	7	6	6	3	5	7	6	5	6
Other Country	2	2	2	2	3	2	1	1	1	4	5	3
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
Transport to B.C. (party)												
Own Auto	37	41	54	68	56	49	41	54	72	38	26	43
Rent Auto	8	5	7	3	9	3	3	2	5	12	7	6
Own Camper	12	14	17	21	21	34	31	41	19	7	4	10
Bus	2	2	1	0	2	0	2	0	2	3	3	2
Air	47	45	25	13	20	19	29	12	9	39	63	42
Train	1	0	1	0	0	2	1	0	0	1	1	1
Cruise	3	0	0	0	0	1	1	1	0	4	1	1
Ferry	16	4	3	3	6	5	9	3	1	29	5	8
Other	1	1	2	1	1	1	1	1	3	1	1	1
TOTAL	**125**	**112**	**110**	**110**	**114**	**114**	**118**	**113**	**112**	**132**	**111**	**114**
Transport in B.C. (party)												
Own Auto	32	40	54	65	53	49	40	52	71	36	26	43
Rent Auto	30	25	19	8	17	11	17	10	8	31	32	21
Own Camper	13	15	19	21	21	31	30	41	19	8	4	10
Bus	13	12	5	2	6	4	4	3	3	16	17	12
Air	5	2	4	4	1	5	9	4	1	4	5	4
Train	3	2	1	0	2	3	4	0	1	2	4	3
Cruise	3	1	0	0	0	2	3	1	1	2	3	2
Ferry	44	16	10	16	14	11	19	5	6	36	21	16
Other	19	16	9	7	8	9	11	2	6	14	27	19
TOTAL	**161**	**129**	**119**	**123**	**122**	**124**	**136**	**117**	**113**	**147**	**140**	**128**
Gender (party)												
Male	41	48	43	44	44	49	56	53	44	43	51	48
Female	59	52	58	56	56	51	44	47	56	57	49	52
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
Age (party)												
15-18	1	2	2	0	2	0	1	1	0	2	2	2
19 -24	7	6	6	2	4	5	3	2	7	7	7	6
25 -34	17	23	21	14	17	16	14	19	19	17	22	21
35 - 44	21	21	21	24	21	21	18	17	24	22	23	23
45- 54	20	16	20	20	18	19	19	16	17	17	19	19
55 - 64	22	17	19	22	22	17	22	24	20	22	17	18
65 and over	12	15	12	17	17	21	24	21	13	14	9	12
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

	Vancouver Island	S.W.B.C.	Ok.- Simil	Kootenay	High	Cariboo-Chil	N by NW	Peace River	Rockies	Victoria	Vancouver	Total
Season (party)												
Winter	13	25	12	14	7	5	7	4	18	11	20	19
Spring	26	24	24	32	26	31	35	23	26	27	25	26
Summer	40	30	38	37	39	48	44	54	36	38	28	31
Fall	22	21	25	18	28	16	14	19	19	24	27	24
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
Package (party)												
No	94	94	98	98	96	98	93	97	96	93	93	94
Yes	6	6	2	2	4	2	7	4	4	7	7	6
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
First Visit to B.C.												
No	78	79	83	85	75	81	75	73	86	64	72	78
Yes	22	21	17	15	25	19	25	27	14	36	28	22
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
Average # of Trips to B.C. in last 3 Years												
None	20	12	14	11	16	20	22	19	12	24	14	13
1	14	11	11	12	14	21	16	20	11	19	14	13
2	19	20	17	22	21	18	24	25	18	19	19	19
3	18	17	18	15	13	20	15	18	16	16	16	16
4 to 5	12	15	14	12	12	8	11	6	15	9	13	13
6 or more	18	25	27	29	24	14	12	13	29	14	24	26
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
Visited Expo '86 last Year												
No	63	56	62	67	68	74	75	71	67	70	60	62
Yes	37	44	38	33	32	26	25	29	33	30	40	38
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
Saw Ads for Travel to B.C.												
No	42	39	39	32	38	40	43	39	38	40	44	41
Yes	58	61	61	68	62	61	57	61	62	60	56	59
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
Requested Info from Tourism B.C.												
No	74	81	81	79	78	74	71	75	82	78	85	84
Yes	26	19	19	21	22	27	29	25	18	22	15	16
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
Timing of Request												
Before deciding on B.C.	40	49	49	49	47	43	55	60	52	50	44	47
After deciding on B.C.	60	51	51	51	53	57	45	40	48	50	57	53
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

Variations by Season

SPRING

- Spring was the preferred season of travel for 25% of all visitor parties to British Columbia in 1989; 25% or 4.5 million of all person-nights spent in British Columbia in 1989 were recorded in the spring months.
- The average party-size of visitors travelling to the province during this time period was 2.55 persons, and the average length of stay was 6.3 nights. These visitors spent an average of $52.25 per person per day, which resulted in $584 million in direct revenue to the Province.
- Albertans were more likely to travel to British Columbia during the spring months (21%) than any other group. Visitors from Washington (15%), Ontario (13%) and overseas (13%), were also important markets during this season.
- The main purpose of trip for 32% of spring visitors was visiting friends and relatives, while 29% came to the province to take a touring trip. Spring conferences and other business travel brought 19% of spring visitors to British Columbia in 1989.
- Of the range of tourist activities, visitors travelling in the spring preferred sightseeing (48%), shopping (36%), and visiting friends and relatives (35%).
- The high propensity to visit friends and relatives while travelling in British Columbia resulted in a large portion of visitors also staying with friends and relatives. Party-nights spent in camp or trailer grounds, accounted for 19% of party-nights, and motels and hotels captured 18% and 17% of party-nights respectively.
- Almost as many visitors arrived in B.C. by air (40%), as visitors travelling to the province by private automobile (41%). Automobile, either private (36%) or rented (21%), were the preferred modes of transportation within the province.
- Twenty-four percent of spring visitors reported this trip as their first visit to British Columbia; some of these visitors could have been motivated to take a trip to B.C. because of advertising. Fifty-seven percent of spring travellers re-

ported seeing ads on travel opportunities in British Columbia.

SUMMER

- During the summer months, the number of party visits increased roughly 5% over spring and fall, to a total of 957,900 or 31% of all visits to the province in 1989.
- Although the average length of stay (2.65) and the average per person daily expenditures ($49.17) for summer visits is lower than both winter and spring, $738 million in gross revenue was generated, more than in any other season.
- The summer season is again more attractive to Albertans (22%) than visitors from other parts of the country or for overseas travellers. Parties from these other destinations show little variation in their tendency to travel to B.C. during the summer months.
- According to respondents, summer is the season for touring British Columbia. Thirty-eight percent recorded touring as the primary motivation for coming to B.C. in the summer, compared to 25% who were visiting friends and relatives.
- As in other seasons, sightseeing (47%) and shopping (36%) are the two most popular activities for summer visitors. The popularity of beach and lakeshore (28%) activities is not surprising.
- Next to staying with friends and relatives (28%), campgrounds and R.V. Parks account for more party-nights (27%) than other types of accommodation. Twenty percent of summer visitors chose to stay in a motel, while only 14% chose a hotel.
- Relative to other seasons, air travel decreased as the primary mode of transportation into the province (32%), and use of campers increased, with 16% of summer visitors using this form of transportation to enter the province.
- Twenty-seven percent of summer visitors had not previously travelled in the province.

FALL

- The shoulder seasons of fall and spring were successful in attracting an almost equal number of visitor parties — 24% of total parties in the fall and 25% in the spring. Although the share of all party-nights attributed to fall travel (22%) was lower than spring.
- Parties travelling in the fall were much smaller in size (2.13 persons), than those travelling in other seasons, and the average length of stay lower (4.83 days). However, the average per person daily expenditure was more than $ 20 greater than all other seasons, contributing $604 million in tourist revenue to the province.
- Parties originating in Alberta (21%) were most likely to travel to B.C. in the fall, while 15% of Washingtonians and 14% of Ontario and "other Canadian" visitors visited B.C. during this season.
- The main purpose of trip for fall visitors is visiting friends and relatives (31%) and touring (26%). Favoured activities for this group are sightseeing (44%), shopping (34%) and visiting friends and relatives (34%).
- With the exception of staying with friends and relatives (32%), fall visitors tend to stay in motels (25%) and hotels (23%). Thirteen percent stayed in campgrounds.
- Fall attracts a large number of visitors who have previously taken a trip to British Columbia — 80% reported previous trips to this province.
- Seeing ads on travel in British Columbia was reported by 58% of fall visitors.

WINTER

- Winter is fast becoming a shoulder season as opposed to the off season in British Columbia. Winter accounted for 20%

of all visitor parties to the province, compared with spring (25%) and fall (24%).

- The share of party-nights attributed to winter visitors and fall visitors are almost equal, 21% and 22% respectively.
- Winter visitors stayed longer than visitors in other seasons — 6.72 nights and they spent an average of $50.90 per day. Their share of gross tourist revenue was 20%.
- The largest share of visitors travelling to B.C. in the winter originate in Alberta (30%), followed by Ontario (17%), "other Canada" (16%) and Washington (15%).
- An overwhelming majority of trips taken in the winter to B.C. are for the purpose of visiting friends and relatives (52%).

TABLE 27

VARIATIONS BY SEASON — TOURISTS

	Winter	Spring	Summer	Fall	Total
Parties	614,910	778,680	957,900	738,510	3,090,000
Share %	20%	25%	31%	24%	
Party-Nights	3,834,000	4,536,000	5,760,000	3,870,000	18,000,000
Share %	21%	25%	32%	22%	
Party-Size	2.46	2.55	2.65	2.13	2.47
Person-Nights	9,431,640	11,566,800	15,264,000	8,243,100	43,700,000
Length of Stay in B.C.	6.72	6.3	5.55	4.83	5.83
Expenditure Per Party Night	$124.81	$128.76	$128.11	$155.97	$133.50
Expenditure per Person per Day	$50.90	$52.25	$49.17	$73.86	$54.90
Gross Revenue (millions)	$480,000,000	$576,000,000	$744,000,000	$600,000,000	$2,400,000,000
Share of Revenue	20%	24%	31%	25%	100%
Origin (Party)					
Alberta	30	21	22	21	23
Ontario	17	13	10	14	13
Other Canada	16	12	8	14	12
Washington	15	15	11	15	14
Oregon	1	3	6	4	4
California	4	8	11	9	9
Other West US	4	8	11	6	8
Other U.S.A	3	7	11	7	7
Overseas	10	13	10	9	10
TOTAL	**100**	**100**	**100**	**100**	**100**
Main Purpose (Party)					
Conference	7	9	3	6	6
Other Business	9	10	7	18	11
Friends & Relatives/ Personal	52	32	25	31	33
Touring Trip	7	29	38	26	27
City Trip	3	4	3	3	3
Outdoors/Wilderness/Adventure	7	8	10	6	8
Resort Vacation	12	5	9	6	8
Other	2	5	6	5	5
TOTAL	**100**	**100**	**100**	**100**	**100**
Activities (Party Nights)					
Conf./Conv	2	4	0	0	2
Corp Meeting	3	4	0	0	2
Trade Show	1	1	0	0	0
Sporting Event	3	2	2	1	2
Festival/Cultural	5	5	5	4	5
Other	0	0	1	2	1
Went Shopping	35	36	36	34	36
Took a Tour	5	10	10	8	9
Sightseeing	25	48	47	44	42
Passing Through	8	18	21	19	17
Conduct Business	8	8	8	17	10
Other Outdoor	11	26	30	18	23
Skiing	16	1	0	0	4
Other Sporting	9	16	11	10	12
Nightlife	16	10	8	11	11
Other	0	0	4	5	2
Beach Lakeshore	9	24	28	21	21
Museum/Historic	5	14	19	17	14
Fair/Amusement Park	1	3	5	3	3
Gardens/Parks	9	23	23	22	20
Friends & Relatives	56	35	26	34	37
Other	0	0	3	3	2
TOTAL	**227**	**288**	**287**	**273**	**275**

	Winter	Spring	Summer	Fall	Total
Accommodation (Party Nights)					
Hotel	17	17	14	23	17
Motel	7	18	20	25	18
Resort	6	4	2	1	3
Bed & Breakfast	1	1	1	1	1
Trailer/Tent/Camper	1	19	27	13	16
Cruise Ship	0	1	2	2	1
Friends & Relatives	60	32	28	32	37
Other	8	8	6	3	6
TOTAL	**100**	**100**	**100**	**100**	**100**
Expenditures (Per Person/Per Day)					
Accommodation	$12.45	$14.55	$13.52	$22.72	$15.33
Auto Transport	$4.51	$6.37	$6.81	$6.81	$6.25
Other Transport	$1.64	$3.00	$2.26	$4.07	$2.67
Package/Cruise	$4.32	$3.60	$3.58	$6.71	$4.30
Restaurants	$11.29	$11.42	$10.14	$16.50	$11.89
Groceries/Bev	$3.30	$3.04	$3.12	$4.32	$3.35
Recreation	$3.41	$1.46	$2.30	$2.11	$2.26
Entertainment	$1.72	$1.49			$1.58
Shopping/Souvenirs	$8.60	$7.23	$6.83	$9.70	$7.79
Other	$1.76	$1.55	$1.77	$3.24	$1.99
TOTAL	**$50.90**	**$52.25**	**$49.17**	**$73.86**	**$54.90**
Transport to B.C. (Party)					
Own Auto	43	41	46	45	44
Rent Auto	2	6	8	6	6
Own Camper	2	10	16	8	10
Bus	3	2	2	2	2
Air	54	40	32	43	41
Train	0	1	1	0	1
Cruise	0	1	3	1	1
Ferry	3	10	10	8	8
Other	1	2	2	1	2
TOTAL	**108**	**114**	**120**	**114**	**115**
Transport in B.C. (Party)					
Own Auto	43	36	49	46	44
Rent Auto	18	21	22	21	21
Own Camper	2	10	16	9	10
Bus	13	12	10	10	11
Air	5	3	3	4	4
Train	2	2	2	3	3
Cruise	0	2	2	2	2
Ferry	11	15	17	17	15
Other	26	18	12	22	19
TOTAL	**119**	**119**	**135**	**134**	**127**
Gender (Party)					
Male	49	49	45	53	49
Female	51	51	55	47	51
TOTAL	**100**	**100**	**100**	**100**	**100**
Age (Party)					
15-18	2	1	2	1	2
19 -24	10	5	5	4	6
25 -34	26	19	18	17	20
35 - 44	25	23	23	19	23
45- 54	16	17	19	22	18
55 - 64	13	21	19	22	19
65 and over	9	14	14	16	13
TOTAL	**100**	**100**	**100**	**100**	**100**
First Visit to B.C.?					
No	88	76	73	80	79
Yes	12	24	27	20	22
TOTAL	**100**	**100**	**100**	**100**	**100**

	Winter	Spring	Summer	Fall	Total
Average # of Trips to B.C. in Past 3 Years					
None	4	11	20	12	12
1	9	16	15	12	13
2	16	19	22	17	19
3	17	15	15	18	16
4 to 5	16	14	11	14	13
6 or more	38	25	18	27	26
TOTAL	**100**	**100**	**100**	**100**	**100**
Visited Expo '86 Last Year?					
No	52	62	68	63	62
Yes	49	38	32	38	38
TOTAL	**100**	**100**	**100**	**100**	**100**
Package Tour?					
No	93	94	94	95	94
Yes	7	6	6	5	6
TOTAL	**100**	**100**	**100**	**100**	**100**
Saw Ads for Travel to B.C.					
No	42	43	37	42	41
Yes	58	57	63	58	59
TOTAL	**100**	**100**	**100**	**100**	**100**
Requested Info from Tourism B.C.					
No	95	85	78	85	85
Yes	6	15	22	15	15
TOTAL	**100**	**100**	**100**	**100**	**100**
Timing of Request					
Before deciding on B.C.	42	54	48	43	48
After deciding on B.C.	58	46	52	57	52
TOTAL	**100**	**100**	**100**	**100**	**100**

Excursion Travel

Visitors to British Columbia, who do not stay overnight in the Province, are called Excursionists and are estimated to total some 775,000 parties of approximately 1.9 million persons in 1989.

Since excursionists were surveyed in the winter and spring seasons only, Tables 29 reflects travel in those two seasons only. Winter has been defined as the months of December, January, February and March, while spring has been defined as April, May and June.

ORIGIN

Figures for number of parties were projected for the year (see Table 28 for a breakdown). As this table shows, 79% (614,900 visitor parties) of excursion travel to B.C. originated in the United States. According to winter and spring data shown in Table 29, approximately 62% of those visitors came from Washington. A further 19% of excursionists originated from other Canadian provinces, primarily Alberta.

REGIONS VISITED

As would be expected, our Washington excursionists had a higher propensity to visit Vancouver or Victoria, while our Albertan visitors were more likely to visit the B.C. Rockies, and this is further evidenced by the fact that over 90% of both Albertan and Washington visitors travelled to B.C. in a private automobile. Ninety percent of Ontarian excursionists, however, travelled by air — which indicates that they travelled directly to B.C., rather than adding a day in B.C. to a longer itinerary either in the U.S. or in other Canadian provinces.

MAIN PURPOSE OF TRIP

While business reasons were given for many excursion trips, especially for Ontarian visitors where 40% came to B.C. for business purposes, visiting friends and relatives and participating in a touring trip were also popular. It is interesting to note that 22% of Ontarian visitors listed an outdoors/wilderness/ adventure trip as the main purpose of their day trip, especially since they were travelling in the winter (18%) and spring (82%) months.

Thirteen percent of Albertans were also participating in outdoor/wilderness/ adventure trips, and a further 31% were on a touring trip. Visiting friends and relatives was a main purpose for 34% of all excursionists to B.C. in the winter and spring of 1989.

For more detailed information, please refer to Tables 28, 29, and 30 below.

TABLE 28 **NUMBERS OF PARTIES PROJECTED FOR EXCURSION TRAVEL**

	Winter	Spring	Summer	Fall	Total
Canada	25,900	41,800	33,500	45,100	146,300
U.S.A.	201,600	152,400	120,200	140,700	614,900
Overseas	3,900	4,800	2,600	2,700	14,000
TOTAL	**231,400**	**199,000**	**156,300**	**188,500**	**775,200**
Months:	D,J,F,M	A,M,J	J,A	S,O,N	

TABLE 29 **VARIATIONS BY SEASON — EXCURSIONISTS**

Note: Excursion figures below are for Winter and Spring travel only.

	Winter	Spring	Sub Total	Projected Total for Year
Parties	231,400	199,000	430,400	775,200
Party-Size	2.39	2.49		
Expenditure Per Party/Per Day	66.63	78.91	72.88	
Expenditure per Person/Per Day	26.18	33.73	29.86	
Origin (Party)				
Alberta	6	19	13	
Ontario	0	1	1	
Other Canada	2	0	1	
Washington	73	49	62	
Oregon	1	6	3	
California	3	4	3	
Other West US	7	13	10	
Other U.S.A	6	4	5	
Overseas	1	3	2	
TOTAL	**100**	**100**	**100**	
Main Purpose (Party)				
Conference	4	7	6	
Other Business	14	19	16	
Visit Friends & Relatives/Personal	44	24	34	
Touring Trip	14	27	20	
City Trip	10	8	9	
Outdoors/Wilderness/Adventure	8	4	6	
Resort Vacation	3	2	2	
Other	4	9	7	
TOTAL	**100**	**100**	**100**	
Activities (Party Days)				
Conf./Conv	1	2	2	
Corp Meeting	3	7	5	
Sporting Event	2	4	3	
Festival/Cultural	5	5	5	
Went Shopping	41	40	41	
Took a Tour	3	5	4	
Sightseeing	29	44	37	
Passing Through	12	17	15	
Conduct Business	12	18	15	
Other Outdoor	3	15	9	
Skiing	5	0	3	
Other Sporting	9	10	9	
Nightlife	3	3	3	
Beach Lakeshore	11	8	10	
Museum/Historic	10	15	12	
Fair/Amusement Park	2	2	2	
Gardens/Parks	14	25	20	
Friends &Relatives	36	24	30	
TOTAL	**201**	**244**	**225**	

	Winter	Spring	Sub Total	
Expenditures (Per Person/Per Day)				
Accommodation	$2.66	$0.40	$1.56	
Auto Transport	$2.39	$2.81	$2.59	
Other Transport	$1.44	$1.68	$1.56	
Package/Cruise	$0.14	$1.67	$0.89	
Restaurants	$6.06	$8.72	$7.36	
Groceries/Bev	$2.96	$2.65	$2.81	
Recreation	$1.53	$0.70	$1.13	
Entertainment	$0.87	$1.33	$1.09	
Shopping/Souvenirs	$5.90	$11.38	$8.57	
Other	$2.29	$2.50	$2.39	
TOTAL	**$26.18**	**$33.73**	**$29.86**	
Transport to B.C. (Party)				
Own Auto	95	84	90	
Rent Auto	4	7	5	
Own Camper	2	4	3	
Bus	0	1	1	
Air	1	3	2	
Train	0	0	0	
Cruise	0	0	0	
Ferry	0	2	1	
Other	0	2	1	
TOTAL	**103**	**103**	**103**	
Transport in B.C. (Party)				
Own Auto	92	84	88	
Rent Auto	4	6	5	
Own Camper	2	3	2	
Bus	0	2	1	
Air	0	1	1	
Train	0	1	1	
Cruise	0	1	0	
Ferry	1	2	1	
Other	1	3	2	
TOTAL	**101**	**103**	**102**	
Gender (Party)				
Male	53	50	52	
Female	47	50	48	
TOTAL	**100**	**100**	**100**	
Age (Party)				
15 – 18	1	0	1	
19 – 24	9	6	7	
25 –34	19	17	18	
35 – 44	24	23	24	
45 – 54	17	20	18	
55 – 64	20	21	20	
65 and over	11	13	12	
TOTAL	**100**	**100**	**100**	

TABLE 30

VARIATIONS BY ORIGIN — EXCURSIONISTS

	Alberta	Ontario	Other Canada	Washington	Oregon	California	Other W. U.S.	Other U.S.	Overseas	Total
	Note: Excursion figures below are for Winter and Spring travel only, except where stated "projected for year".									
Parties										
(Projected for Year)	100,776	6,202	7,752	480,624	23,256	23,256	77,520	38,760	15,504	775,200
Share %	13%	1%	1%	62%	3%	3%	10%	5%	2%	100%
Party-Size	2.82	2.64	4.36	2.39	2.36	2.71	2.55	2.11	2.14	
Length of Stay	3.78	9.22	8.67	0.43	9.09	10.87	13.57	9.88	12.18	
Expenditure per Party per Day	$50.05	$43.54	$293.77	$70.09	$68.46	$116.48	$49.96	$38.59	$77.02	$70.42
Expenditure per Person per Day	$16.94	$21.77	$59.93	$28.31	$28.77	$42.00	$19.37	$19.54	$59.55	$29.50
Gross Revenue (Projected for Year)	$5,043,839	$270,018	$2,277,305	$33,686,936	$1,592,106	$2,708,859	$3,872,899	$1,495,748	$1,194,118	$52,141,828
Regions Visited (Party Days)										
S.W.B.C.	2			19	7		20			13
Ok.-Simil				24					1	15
Kootenay	4			2	10		5			2
High Country										1
North by Northwest									57	6
Peace River				1						0
B.C. Rockies	84	100	100	1	2		28	11		13
Greater Victoria				2		18	3	5		2
Greater Vancouver	10			52	82	82	44	85	42	48
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
Main Purpose (Party)										
Conference	0	40	0	7	16	0	5	0	5	6
Other Business	15			20	15		8		8	16
Visit Friends & Relatives/Personal	26	39	37	36	22	27	50	9	38	34
Touring Trip	31		25	15	8	42	23	30	32	19
City Trip	1			9	17	21	5	33	5	9
Outdoors/Wilderness/Adventure	13	22	0	6	7	0	2	11	1	6
Resort Vacation	5		38	0	16	3	3	7		3
Other	9	0	0	7	0	7	4	10	10	7
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

	Alberta	Ontario	Other Canada	Washington	Oregon	California	Other W. U.S.	Other U.S.	Overseas	Total
Acitivites (Party)										
Conference/Convention	0	0	0	2	0	0	3	0	0	2
Corporate Meeting	5	0	0	6	14	0	6	0	1	5
Sporting Event	1	0	0	2	0	0	0	0	6	2
Festival/Cultural	3	0	0	6	0	0	9	0	6	5
Went Shopping	43	0	14	41	34	60	51	50	32	41
Took a Tour	4	0	0	2	9	14	1	5	13	4
Sightseeing	20	54	11	30	45	63	54	82	65	38
Passing Through	42	100	10	9	31	11	24	11	8	15
Conduct Business	5	0	0	20	27	0	6	0	3	15
Fishing	2	0	0	0	0	0	0	0	18	2
Other Outdoor	6	0	11	7	0	0	1	3	30	7
Skiing	4	0	89	2	0	0	1	0	0	3
Other Sporting	9	0	0	7	6	0	8	2	35	9
Nightlife	2	0	0	4	0	0	0	0	12	3
Beach Lakeshore	6	0	0	12	3	16	4	20	3	10
Museum/Historic	4	0	0	9	21	47	21	11	26	12
Fair/Amusement Park	3	0	0	2	0	7	4	0	0	2
Gardens/Parks	3	54	11	18	9	36	35	42	30	20
Friends &Relatives	19	0	0	33	12	0	16	9	77	30
TOTAL	**181**	**208**	**146**	**212**	**211**	**254**	**244**	**237**	**365**	**225**
Expenditures (per person per day)										
Accommodation	$0.38	$0.00	$23.92	$0.85	$0.16	$0.00	$0.55	$0.00	$2.87	$1.60
Auto Transport	$4.05	$0.00	$4.20	$1.86	$3.52	$1.57	$1.59	$3.14	$1.49	$2.33
Other Transport	$0.00	$2.72	$0.00	$1.29	$2.28	$6.09	$1.67	$1.61	$7.49	$1.58
Package/Cruise	$0.00	$1.51	$0.00	$0.09	$0.54	$0.00	$0.00	$0.00	$18.43	$0.86
Restaurants	$4.25	$12.30	$3.70	$6.97	$13.40	$5.96	$6.17	$7.33	$14.10	$6.89
Groceries/Bev	$4.85	$0.00	$5.47	$2.50	$0.64	$2.37	$2.66	$0.24	$0.30	$2.70
Recreation	$0.78	$0.00	$14.06	$0.55	$1.13	$1.23	$0.28	$0.73	$2.16	$1.19
Entertainment	$0.00	$0.00	$2.62	$0.95	$1.66	$0.00	$0.00	$0.07	$0.08	$0.70
Shopping/Souvenirs	$2.41	$0.94	$5.96	$10.29	$4.27	$23.02	$5.19	$5.37	$7.49	$8.41
Other	$0.21	$8.01	$0.00	$3.00	$1.22	$1.76	$1.27	$1.04	$6.79	$2.31
TOTAL	**$16.94**	**$21.77**	**$59.93**	**$28.31**	**$28.77**	**$42.00**	**$19.37**	**$19.54**	**$59.55**	**$29.50**
Transport to B.C. (Party)										
Own Auto	92	17	88	99	93	67	71	59	51	90
Rent Auto	0	43	0	0	0	18	21	39	4	5
Own Camper	2	0	0	2	7	8	8	0	3	3
Bus	1	0	0	0	0	0	0	0	24	1
Air	0	40	12	0	0	4	0	0	46	2
Train	0	0	0	0	7	0	0	0	0	0
Cruise	0	0	0	0	0	4	0	0	0	0
Ferry	0	0	0	0	0	7	2	3	0	1
Other	5	22	0	0	0	0	0	0	0	1
TOTAL	**101**	**122**	**100**	**102**	**107**	**107**	**102**	**100**	**126**	**103**

	Alberta	Ontario	Other Canada	Washington	Oregon	California	Other W. U.S.	Other U.S.	Overseas	Total
Transport in B.C. (Party)										
Own Auto	92	21	100	95	67	73	74	62	51	88
Rent Auto	0	53	0	0	7	27	20	27	4	5
Own Camper	3	0	0	2	0	0	7	0	0	2
Bus	0	0	0	0	0	0	0	0	46	1
Air	0	0	0	0	0	0	0	0	24	1
Train	0	0	0	0	16	0	0	6	0	1
Cruise	0	0	0	0	0	0	0	6	0	0
Ferry	0	0	0	1	3	0	0	6	24	1
Other	5	53	0	1	7	0	0	6	0	2
TOTAL	**100**	**126**	**100**	**100**	**100**	**100**	**100**	**112**	**147**	**102**
Gender (Party)										
Male	37.9	60.2	30.6	54.8	49.6	48.1	58.8	47.4	57.5	52.1
Female	62.1	39.8	69.4	45.2	50.4	51.9	41.2	52.6	42.5	47.9
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
Age (Party)										
15-18		22		1						1
19 -24	6		5	6			14	14	35	7
25 -34	26	22	27	17	4	36	15	20	16	19
35 - 44	29		31	25	24	21	29	5	7	24
45- 54	19	18	25	18	7	23	14	31	22	18
55 - 64	14	39	12	20	37	12	25	14	18	20
65 and over	5			14	27	7	4	17	3	12
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
Season (Party Days)										
Winter	27	18	86	63	21	43	40	64	25	53
Spring	73	82	14	38	79	57	60	36	75	47
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
First Visit bo B.C.? (Party)										
No	100	48	88	98	97	42	66	44	68	89
Yes		52	12	2	3	58	34	56	32	11
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
Average # of Trips to B.C. in Last 3 Years (Party)										
None	5	35	6	22		49	32	29	14	20
1	11		45	7	5	24	24	36	47	11
2	18		14	7	51		13		4	11
3	11	65		13		27	7	11	10	12
4 to 5	9		6	13			4	24	13	11
6 or More	45		29	38	44		21		12	36
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

	Alberta	Ontario	Other Canada	Washington	Oregon	California	Other W. U.S.	Other U.S.	Overseas	Total
Visited Expo '86 (Party)										
No	61	100	61	42	67	78	89	81	62	52
Yes	39		40	58	33	22	11	19	38	48
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
Package Tour (Party)										
No	100	100	87	100	100	100	100	100	100	100
Yes			13							0
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
Saw Ads for Travel to B.C. (Party)										
No	40	39	50	40	48	66	62	68	51	45
Yes	60	61	50	60	52	34	38	33	49	55
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
Requested Info from Tourism B.C.? (Party)										
No	97	100	86	94	96	100	98	86	77	94
Yes	3		14	6	4		2	14	24	6
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
Timing of Request										
Before deciding on B.C.	100		100	72	100		43	68	100	72
After deciding on B.C.		100		28			57	32		28
TOTAL	**100**	**100**	**100**	**100**	**100**	**0**	**100**	**100**	**100**	**100**

Changes in Visitors' Travel Patterns: 1979 – 1989

COMPARISONS BETWEEN 1979,1987 &1989

The 1987 visitor survey was the first province wide survey to be conducted since 1979. With the results of the 1989 survey complete, we can now make comparisons to identify changes and chart patterns. Several differences in methodology should be noted by the reader while reviewing these comparisons. The 1979 survey was an "exit" survey using personal interviews and covered a period of May — October; the 1987 version was an "entry" survey employing a self-completed diary technique plus a follow-up telephone interview and covered the period June to October; and the 1989 data is a composite of the summer 1987 visitor survey and a survey conducted in the winter and spring of 1989. Differences between 1989 and 1987 data are largely explained by the difference in survey period. The 1989 data provides the first accurate profile of our visitors on a year-round basis.

Origin of Visitor Parties

- Between the summers of 1979 and 1987 there was a sizeable decrease in the relative proportion of visitors from Canada and most notable Alberta.
- Conversely, between 1979 and 1987, the proportion of visitors arriving in British Columbia from the U.S. increased substantially, growing from 45% to 57%. However, by 1989, visitors from the United States comprised just 42% of British Columbia's market. The true relative importance of the U.S. market is shown in the 1989 data.

Length of Stay

- There was a dramatic shift towards fewer and shorter trips between 1979 and 1987 and this trend continued in 1989.
- There has been a slight increase in visitor parties staying 8 to 10 nights (11%) compared with both 1987 (8%) and 1979 (8%).
- The average length of stay was longer in 1979 (6.10) nights), dropped slightly in 1987 to 5.7 nights and increased to 5.8 nights in 1989.

B.C. as Main Destination

- British Columbia was the main destination for 75% of all visitors in 1979; this dropped to 62% in 1987, but by 1989 B.C. was the major destination for 72% of visitors.

Party Size

- Among the three surveys, an average party size of 2 persons was most common.
- One person parties decreased significantly between 1979 and 1987, but between 1987 and 1989 the number of one person parties grow substantially. Two person parties declined proportionately between 1989 and 1987.

Main Purpose of Trip

- Business trips to British Columbia have been steadily increasing — 10%, 11% and 16% respectively.

Mode of Transportation to B.C. (parties)

- The automobile has retained its dominance as the preferred mode of travel, although automobile use has declined from 60% in 1979 to 48% in 1987 and 44% in 1989.
- While R.V. travel has declined slightly, visitors using air transportation to enter the province has increased dramatically; in 1989 air travel accounted for 42% of all party visits.

Accommodation Type (Visitor Parties)

- Choice of accommodation has changed over the three survey periods. Use of motels has declined considerably from 30% in 1979 to 18% in 1989, while staying with friends and relatives increased considerably 22% to 37%.
- There was a minor decrease in the use of campgrounds between 1979 and 1989.

Expenditures (Party per Day)

- Relative expenditures on accommodation increased 161%, while expenditures on shopping grew by 171%.
- The relative expenditures on recreation and entertainment increased 75% and auto transportation expenditures grew by 90%.

TABLE 31 **VARIATIONS BETWEEN 1979, 1987 AND 1989**

	1979	1987	1989
Origin (Party)			
Alberta	33%	19%	23%
Ontario	6%	7%	13%
Other Canada	9%	8%	12%
Sub total Canada	**48%**	**34%**	**48%**
Washington	18%	14%	14%
Oregon	5%	6%	4%
California	11%	13%	9%
Other West US	6%	12%	8%
Other US	5%	12%	7%
Sub total United States	**45%**	**57%**	**42%**
Overseas	**6%**	**10%**	**10%**
Length of Stay in BC (Party-Nights)			
I Night	17%	11%	12%
2 Nights	19%	21%	16%
3 Nights	14%	14%	15%
4 Nights	10%	10%	12%
5 to 7 Nights	19%	22%	21%
8 to 10 Nights	8%	8%	11%
10+ Nights	13%	14%	14%
Average Length of Stay (Nights)	**6.10**	**5.70**	**5.84**
BC as a Main Destination (Party)			
Yes	75%	62%	72%
No	25%	38%	28%
Party Size (Party)			
1	20%	12%	23%
2	47%	55%	47%
3	11%	10%	10%
4	13%	15%	12%
5 to 10	8%	7%	6%
11+	1%	1%	2%
Main Purpose of Trip (Party)			
Business	10%	11%	16%

	1979	1987	1989
Mode of Transportation to BC (Party)			
Own Auto	60%	48%	44%
Rented Auto	N/A	8%	6%
Camper	15%	14%	10%
Bus	2%	3%	2%
Air	19%	30%	42%
Train	1%	1%	1%
Cruise	N/A	4%	1%
Ferry	2%	11%	8%
Other	1%	1%	2%
Accommodation Type (Party-Nights)			
Hotel	15%	16%	17%
Motel	30%	24%	18%
Resort	1%	2%	3%
Bed & Breakfast	N/A	1%	1%
Trailer/Tent/Camper	27%	24%	16%
Cruise Ship	4%	3%	1%
Friends & Relatives	22%	26%	37%
Other	1%	4%	6%
Expenditures (Party per Day)			
Accommodation	$14.00	$36.00	$36.52
Auto Transportation	$8.00	$15.00	$15.22
Other Transportation	$3.00	$7.00	$6.53
Package/Cruise		$12.00	$10.49
Restaurants	$16.00	$26.00	$28.64
Groceries/Bev.	$5.00	$8.00	$8.17
Recreation/Entertainment	$4.00	$5.00	$9.29
Shopping/Souvenirs	$7.00	$18.00	$19.00
Other	$5.00	$5.00	$4.85
Total	***$62.00**	***$131.00**	***$133.50**

*** These figures are in current dollars, and therefore represent nominal increases.**

VISITOR '89
APPENDIX

The following pages show some results of supplementary analysis of Visitor '89 data:

- The effects of visitor characteristics on their lengths of stay and expenditures;

- The "natural" groupings of visitor activities.

EFFECTS OF VISITOR AND TRIP CHARACTERISTICS

The effects of visitor and trip characteristics (taking each characteristic in turn, while keeping the others constant) on visitor behaviour (e.g. length of stay, expenditures, activities, ...) can be of considerable interest in understanding the dynamics of the tourism industry and in formulating marketing strategies.

Table 32 shows the effects of visitor and trip characteristics (independent variables) on visitor expenditures and lengths of stay (dependent variables) in British Columbia.

The results were obtained using Regression Analysis — a statistical procedure which tries to account for variations observed in the value of a particular dependent variable, in terms of the concurrent variation in one or more independent (or causal) variables.

Visitor and trip characteristics were found to account for only a relatively small percentage of the variations (indicated by the R^2 value) in the expenditures and lengths of stay for visitors (note that R^2 values can range from 0 to 1.0, i.e. from none to all of the variation being explained). However, all of the results in Table 32 are statistically highly significant (a chance of less than 1% that the results could be due to random effects).

The following are a few examples to assist in interpreting Table 32.

Compared to "Other Canadians" (and all other factors being equal), visitors from Ontario spent on average:

$ 9.04 more per person per day
$89.30 more per person per trip
0.83 more nights in B.C.

Visitors who requested travel information, compared to those who did not (other factors being equal), spent on average:

$ 6.58 more per person per day
$30.00 more per person per trip
0.83 more nights in B.C.

Visitors staying with friends, compared to those staying in "Other Accommodations", spent on average:

$17.31 less per person per day.

TABLE 32
EFFECTS OF VISITOR AND TRIP CHARACTERISTICS

Independent Variables	$/Person Per Day	$/Person Total	Nights In B.C.
Constant	59.20	97.60	5.02
Alberta	- 3.37	- 29.47	- 0.58
Ontario	9.04	89.30	0.83
Washington	- 5.61	- 83.30	- 2.55
Oregon	—	- 41.77	- 1.80
California	—	—	- 1.35
Western U.S.A.	—	—	- 1.35
Other - U.S.A.	11.24	—	- 1.39
Overseas	5.38	41.04	0.91
** Compared to "Other Canadian" visitors*			
Vancouver Island	- 2.64	—	0.59
Okanagan	- 7.46	—	0.27
Kootenay	- 6.89	- 80.05	- 0.59
High Country	- 9.51	- 53.97	0.58
Cariboo	- 9.99	—	2.45
North-Northwest	—	- 73.75	1.96
Peace/Alaska Hwy.	- 8.25	—	1.71
B.C. Rockies	- 10.75	- 83.34	- 0.80
**Compared to "Greater Vancouver" visitors*			
Auto	—	—	- 0.19
Camper	—	- 74.67	0.50
Air	8.06	99.96	0.97
**Compared to "Other" modes of travel to B.C.*			
Business	20.67	74.10	- 0.50
Friends & Relatives	- 2.64	- 75.12	1.37
Touring	2.40	63.22	—
Outdoor	6.58	32.53	0.99
Resort	7.23	89.24	0.83
Cruise	54.00	—	0.47
**Compared to "Other" main trip purposes*			
Non-BC Destination	- 4.03	- 38.36	- 3.23
**Compared to BC being the main destination*			

TABLE 32 (CONT'D.)

Independent Variables	$/Person Per Day	$/Person Total	Nights in B.C.
Saw BC Ads	4.01	40.60	0.17
Requested Information	6.58	30.00	0.83
First BC visit	1.32	—	- 0.53
Visited EXPO 86	-1.30	- 34.45	0.35
Child in Party	-10.59	- 22.65	0.69
**Compared to "No" in each case*			
Party Size	- 7.99	- 40.69	- 0.13
Nights on Trip	0.09	- 1.58	0.14
Nights in BC	- 0.51	20.19	—
Household Income ($10K)	5.87	60.04	- 0.18
**Per additional unit in each case*			
Winter	- 2.77	- 30.04	0.75
Spring	2.45	—	0.79
Autumn	6.94	—	- 0.59
**Compared to Summer*			
Hotel	51.00		
Motel	19.86		
Campground	- 12.19		
Friends	- 17.31		
**Compared to "Other" accommodation*			
R^2	0.18	0.35	0.37
Standard Deviation	81.92	272.36	4.07
Mean	54.92	320.73	5.84

"NATURAL" GROUPINGS OF VISITOR ACTIVITIES

In formulating marketing strategies and developing tourism products, it is helpful to have an idea of how visitors tend to group the activities they pursue on their trip.

Factor Analysis was carried out to identify possible interdependence among the activities of visitors. The goal was to provide a richer understanding of the underlying structure of activities, to assist in developing tourism products.

Unlike many statistical techniques, Factor Analysis does not provide definitive results or objective measures of its quality. Nevertheless, it can be useful in summarizing relationships among variables and in highlighting patterns in data.

The results that have been obtained from the analysis of visitor activities are not particularly startling. They confirm some widely accepted patterns and provide a few insights and indications of importance regarding activities.

Table 33 shows the seasonal activity groupings or "factors" that were obtained, together with the percentage of the total variation in activity patterns which is explained by each factor. Within each group, activities are listed in order of importance. Seasonal activity groupings which represented only a very small proportion of the variation were not reported.

To interpret the factors or activity groupings, it is helpful to focus on what the activities have in common. A few examples of factor interpretations from Table 33 are given below:

- The first factor or activity grouping in summer appears to represent at "city trip". This tourism product is characterized by activities such as visiting museums or historic sites and gardens or parks, sightseeing, taking tours and shopping.
- The second activity grouping in summer can be identified as an "outdoor trip". The activities in this group tend to focus on the active, outdoor experience.
- In winter, the eighth activity grouping listed (skiing and nightlife) indicates a "ski resort holiday".

The activity categories in the Winter/Spring portion of the survey were more extensive than those in the Summer/Autumn portion, which was conducted earlier. As a result, some of the seasonal activity groupings in Winter/Spring may be more recognizable as tourism products.

TABLE 33
SEASONAL ACTIVITY GROUPINGS

WINTER	SPRING	SUMMER	AUTUMN
16% Garden, parks Museums, historic Sightseeing	17% Sightseeing Gardens, parks Museums,historic Took a tour Beach, lakeshore Shopping	23% Museums, historic Gardens, parks Sightseeing Took a tour Shopping	23% Museum, historic Sightseeing Gardens, parks Beach, lakeshore Took a tour Shopping
7% Friends, relatives Shopping	8% Other sporting Friends, relatives Festivals, cultural Other outdoor	9% Other outdoor Other sporting Beach, lakeshore	10% Other attended Oher activity Oher visited
6% Corporate meeting Conduct business	7% Corporate meeting Conduct business	8% Other attended Other activity Other visited	8% Other sporting Sporting event Oher outdoor
6% Sporting event Other sporting	5% Conference/convention Night life	7% Conduct business Night life	7% Friends, relatives
5% Fitness activity Conference/convention Cultural/festival	5% Skiing Sporting event	6% Sporting event	6% Night life Conduct business Festival, cultural
5% Fair/amusement parks Took a tour Golf	5% Fishing Golf	- -	- -
5% Fishing Hunting	4% Hunting Trade show	- -	- -
5% Skiing Night life	- -	- -	- -
5% Trade show			

VISITOR '89

APPENDIX B

1. In what province, state or country do you live?

_____

2. What is your postal or zip code? _____

3. How many nights, *if any*, were you away from home *before* entering BC.?

_____ nights

4. Your first day in BC. was: MAY ____ DAY ____

5. How many nights *in total* do you expect to be away from home on this trip?

_____ nights in total

6. And how many nights will you spend in BC.?

_____ nights in BC.

7. What province, state or country is your major destination on this trip?

_____

8. And *in B.C.*, what is your main destination?

_____

9. Please check your MAIN METHOD(S) of travel to get to BC. and also the MAIN METHOD(S) of travel you used while you were in BC.

	to B.C.	within B.C.
Own Automobile	☐	☐
Rented Automobile	☐	☐
Own Motorhome/ Camper	☐	☐
Bus	☐	☐
Air	☐	☐
Train	☐	☐
Cruise Ship	☐	☐
Ferry	☐	☐
Other	☐	☐

10. Did you travel to BC. as part of a packaged tour?

☐ Yes ☐ No

11. Please check those of the following which best describe the MAIN purpose(s) of this trip.

BUSINESS
- ☐ Attend conference/convention
- ☐ Attend corporate meeting
- ☐ Attend trade show
- ☐ Other business

PLEASURE
- ☐ Visit friends/relatives
- ☐ Touring trip
- ☐ City trip
- ☐ Personal matters
- ☐ Outdoors trip
- ☐ Wilderness/Adventure trip
- ☐ Resort vacation
- ☐ Cruise
- ☐ Visit theme park
- ☐ Special exhibition/Event

Now please go back and place a circle (O) around the box which best describes the ONE MAJOR purpose of this trip.

12. Prior to your trip did you see any advertisements for travel to B.C.?

☐ I saw no advertising — Continue at Question 13

I saw advertising in the following media:

☐ TV ☐ Magazine
☐ Newspaper ☐ Other medium

☐ I saw advertising, but I can't recall where

13. Did you request and receive any travel information from Tourism B.C. before you left for this trip?

☐ Yes — Continue at Question 14
☐ No — Skip to Question 15

14. If yes: Did you request the information before or after you made your final decision to visit B.C.?

☐ Before ☐ After

15. Please indicate the NUMBER of business, business/pleasure and pleasure trips, of one night or more, that you have taken in the past *12 months* to any destination.

	LESS THAN 1,000 MILES	1,000 MILES OR MORE
Business	____ trips	____ trips
Business & pleasure	____ trips	____ trips
Pleasure	____ trips	____ trips

16. Is this your first visit to British Columbia?

☐ Yes — Skip to Question 19
☐ No — Continue at Question 17

17. If no: In total, how many trips of one night or more have you taken to B.C. in the past 3 years?

_____ trips

18. And did you visit Expo '86 in Vancouver?

☐ Yes ☐ No

19. The total number of people (including yourself) in your travelling party is

_____ people

20. Please indicate the total number of males/females (including yourself) in your travelling party in each of the following age categories:

	Under 15	15-18	19-24	25-34	35-44	45-54	55-64	65+
MALE								
FEMALE								

21. You are ☐ Male ☐ Female

22. Your age:

☐ 15 - 18 ☐ 19 - 24 ☐ 25 - 34
☐ 35 - 44 ☐ 45 - 54 ☐ 55 - 64
☐ 65 +

23. Your TOTAL annual household income in Canadian funds is:

- ☐ Under $20,000
- ☐ $20,000 to 39,999
- ☐ $40,000 to 59,999
- ☐ $60,000 +

24. What percentage of the costs of this trip is being paid for through business?

_____ percent

25. And finally, please write any further comments you might have about your trip to British Columbia.

_____

_____

_____

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_____

_____

Please mail this back to us in one of the business-reply envelopes provided (Canadian or U.S.). Thank you again for your help.

If you have misplaced the return envelope, we would very much appreciate your returning the diary to us at:

VISITOR '89
Suite 502, 1755 West Broadway
Vancouver, B.C., Canada
V6J 4S5

Province of British Columbia
Ministry of Tourism and Provincial Secretary

Visitor '89

Dear Visitor:

Welcome to Super, Natural British Columbia. Thank you for agreeing to be part of our travel study. We hope you enjoy your stay with us.

The questionnaire is like a daily diary. Please jot down where you stayed and what you did and purchased each day. This daily record will be very helpful to Tourism British Columbia in making British Columbia a better place to visit.

You'll also see there are a few basic questions about you on the back panel. If you're travelling with others please be sure to answer those questions as well as the diary section on behalf of your whole travelling party.

In appreciation of your cooperation we will send you a beautiful frameable quality poster as a small memento of your visit to British Columbia, and enter your name into a draw for several Canadian gold coins.

Thank you very much for your help.

Bill Reid

Honourable Bill Reid
Minister of Tourism and
Provincial Secretary

PS Please don't forget to post this diary on your last day in B.C. — and also be sure to fill out the poster request card.

Thanks again!

Entry Point: JASPER
№ 5395

FOLLOW THIS EXAMPLE

What you and your party did each day while in B.C.

	SAMPLE	DAY 1	DAY 2	DAY 3	DAY 4	DAY 5	DAY 6	DAY 7	DAY 8	DAY 9	DAY 10	DAY 11	DAY 12	DAY 13	DAY 14
EACH DAY'S DATE: BEGINNING WITH YOUR FIRST DAY IN B.C.	June 1														
CITY/TOWN/AREA WHERE YOU STAYED EACH NIGHT	Victoria														
TYPE OF ACCOMMODATION	H														
DAILY ACTIVITIES															
ATTENDED: CONFERENCE/CONVENTION															
CORPORATE MEETING															
TRADE SHOW															
SPORTING EVENT	✓														
FESTIVAL/CULTURAL/SPECIAL EVENT															
ACTIVITIES: WENT SHOPPING	✓														
TOOK A TOUR															
SIGHTSEEING	✓														
TRAVELLING/PASSING THROUGH															
CONDUCTED BUSINESS															
HUNTING															
FISHING															
OTHER OUTDOOR ACTIVITIES	✓														
SKIING															
GOLF															
FITNESS ACTIVITIES															
OTHER SPORTING ACTIVITIES															
NIGHTLIFE															
VISITED: BEACH/LAKESHORE	✓														
MUSEUM/GALLERY/HISTORIC SITE															
FAIR/AMUSEMENT PARK															
GARDENS/PARKS	✓														
FRIENDS/RELATIVES															
PLEASE ESTIMATE (TO THE NEAREST DOLLAR) WHAT YOU AND YOUR PARTY SPENT EACH DAY ON EACH OF THE FOLLOWING: (in Canadian $)															
ACCOMMODATION $	65														
AUTO TRANSPORTATION (gas, repairs, rentals) $	10														
OTHER TRANSPORTATION (ferries, buses, taxis) $															
TOUR PACKAGE OR CRUISE (SEE NOTE) $															
RESTAURANT MEALS/REFRESHMENTS $															
GROCERIES/BEVERAGES $	30														
RECREATION $															
ENTERTAINMENT $															
SHOPPING/SOUVENIRS $	20														
OTHER EXPENSES $	10														
TOTAL EXPENDITURES FOR THE DAY $	135														

Province of British Columbia

Ministry of Tourism and Provincial Secretary

NOTES ON TYPES OF ACCOMMODATION

If you do not stay the night:

- Enter the name of the place in BC where you spent the most time
- Leave the accommodation space blank

If you do stay the night in B.C.:

- Enter the place in BC where you stayed the night
- Please code the type of accommodation you use each night, using the single letter code indicated below

H — Hotel
M — Motel
R — Resort
B — Bed and Breakfast
T — Trailer/Tent/Camper
C — Cruise Ship
F — With friends or relatives
O — Other
X — Did not spend the night in BC

NOTES ON MEETINGS PACKAGES, PACKAGED TOURS AND CRUISES

If you were on a prepaid meeting package, packaged tour or cruise during all or part of your stay in BC, please follow the directions below:

- Record on the line for Tour Package or Cruise, the approximate daily value for each day covered by the meeting, tour or cruise while you were in BC
- Then place an "X" beside each of the specific services provided in your prepaid package (meeting, tour or cruise), for each day covered by the package in BC.

Here's an example of how you would complete the expenditures section if your tour package cost $600 and lasted three days ($200/day) and included accommodations, meals and entertainment, and you also did some extra shopping:

Tourism

Recreation and Culture

DETAILS OF YOUR TRIP.

1. How many nights, if any, were you away fro home before entering B.C.?

_____ nigh

2. Your first day in B.C. was: ___ DAY/ _____ M

3. And how many nights *in total* do you expect be away from home on this trip?

_____ nights in tot

4. Is B.C. your major destination on this trip?

Yes☐ No

5. If no, what province/ state/ or country is yo major destination?

PROVINCE/STATE/COUNTRY _____

6. Please check your MAIN METHOD(S) of tra to get to B.C. and also the methods of tra you used while you were in B.C.

	TO B.C.	WITHIN I
Own Automobile	☐	☐
Rented Automobile	☐	☐
Own Motorhome/ Camper	☐	☐
Bus	☐	☐
Air	☐	☐
Train	☐	☐
Cruise Ship	☐	☐
Ferry	☐	☐
Other	☐	☐

7. Did you travel to B.C. as part of a package tour?

Yes☐ No☐

8. Please check those of the following which best describe the MAIN purpose(s) of this trip.

BUSINESS

Business	☐
Conference/Convention	☐

PLEASURE/PERSONAL

Visit Friends/Relatives	☐
Touring Trip	☐
City Trip	☐
Personal Matters	☐
Outdoors Trip	☐
Wilderness/Adventure Trip	☐
Resort Vacation	☐
Cruise	☐
Visit Theme Park	☐
Exhibition/Special Event	☐

Now, please go back and place a circle (O) around the box which best describes the ONE MAIOR purpose of this trip.

9. Prior to your trip did you see any advertisements for travel to B.C.? Yes☐ No☐

If yes: What type? TV☐ Magazine☐ Other☐ Can't Recall☐

10. Did you request and receive any travel information from Tourism B.C. before you left for your trip? Yes☐ No☐

If yes: Did you request the information before or after you made your final decision to visit B.C.? Before☐ After☐

OTHER HOLIDAYS THAT YOU HAVE TAKEN.

11. Please indicate below the NUMBER of business and pleasure trips, of one night or more, that you have taken in the past *12 months* of less than or more than 1,000 miles from home.

	LESS THAN 1000 MILES	1000 MILES OR MORE
Business	_____ trips	_____ trips
Pleasure/ Personal	_____ trips	_____ trips

12. Is this your first visit to British Columbia?

Yes☐ No☐

13. If no: In total, how many trips of one night or more have you taken to B.C. in the past 3 years?

_____ trips.

And did you visit Expo '86 in Vancouver last summer?

Yes☐ No☐

ABOUT YOU AND YOUR TRAVELLING COMPANION(S).

14. The total number of people (including yourself) in your travelling party is:

_____ people.

15. Please indicate the total number of males/ females (including yourself) in your travelling party in each of the following age categories

	MALES	FEMALES
Under 15		
15 - 18		
19 - 24		
25 - 34		
35 - 44		
45 - 54		
55 - 64		
65+		

16. You are: Male☐ Female☐

17. Your age:

15 - 18☐	45 - 54☐
19 - 24☐	55 - 64☐
25 - 34☐	65+ ☐
35 - 44☐	

18. You live in:

CITY/TOWN _____

PROVINCE/STATE _____

COUNTRY _____

POSTAL/ZIP CODE _____

19. Your TOTAL HOUSEHOLD income in Canadian Funds is:

Under $20,000 ☐	$40,000 to 59,999☐
$20,000 to 39,999☐	$60,000+ ☐

20. Is a portion of this trip being paid for through business? Yes☐ No☐

And finally please write any further comments you might have about your trip to British Columbia?

_____

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Please mail this back to us in the business reply envelope provided. Thank you again for your help!

If you have misplaced the return envelope we would very much appreciate your returning the diary to us.

Our mailing address is:

Visitors '87
Suite 303 - 2930 Arbutus Street
Vancouver, B.C.
Canada
V6J 3Y9

Tourism

Recreation and Culture

Visitors '87

Dear Visitor,

Welcome to British Columbia. Thank you f agreeing to be part of our travel study. We hope y enjoy your stay with us.

This questionnaire is like a daily diary. Please j down where you stayed and what you did a purchased each day. This daily record will be ve helpful to Tourism British Columbia in maki British Columbia a better place to visit.

You'll also see there are a few basic questio about you on the back panel. If you're travelli with others please be sure and answer those que tions as well as the diary section on behalf of yo whole travelling party.

In appreciation of your cooperation we are i cluding a small memento of your visit to Briti Columbia.

Thank you very much for your help.

Hon. Bill Re

Minister of Tourism, Recreation and Cultu

P.S. Please don't forget to post this diary on your la day in B.C.

Thanks again!

FOLLOW THIS EXAMPLE.

What you and your party did each day while in B.C.

EACH DAY'S DATE →	SAMPLE June 1	DAY 1	DAY 2	DAY 3	DAY 4	DAY 5	DAY 6	DAY 7	DAY 8	DAY 9	DAY 10	DAY 11	DAY 12	DAY 13	DAY 14
CITY/TOWN/AREA WHERE YOU STAYED EACH NIGHT.	Victoria														
TYPE OF ACCOMMODATION.	Motel														
DAILY ACTIVITIES:															
ACTIVITIES: WENT SHOPPING															
TOOK A TOUR															
SIGHTSEEING	✓														
TRAVELLING/PASSING THROUGH															
BUSINESS															
OUTDOOR ACTIVITIES	✓														
SPORTING ACTIVITIES															
NIGHTLIFE															
OTHER ACTIVITIES:															
VISITED: BEACH/LAKESHORE															
MUSEUM/GALLERY	✓														
HISTORIC SITE															
FAIR/AMUSEMENT PARK															
GARDENS/PARKS	✓														
FRIENDS/RELATIVES															
OTHER:															
ATTENDED: SPORTING EVENT															
FESTIVAL/SPECIAL EVENT															
CULTURAL PERFORMANCE															
OTHER EVENT:	✓														
PLEASE ESTIMATE WHAT YOU AND YOUR PARTY SPENT EACH DAY ON EACH OF THE FOLLOWING: (Canadian $)															
ACCOMMODATION	$ 85	$	$	$	$	$	$	$	$	$	$	$	$	$	$
AUTO TRANSPORTATION (gas, repairs, rentals)	$ 10														
OTHER TRANSPORTATION (ferries, buses, taxis)	$														
PACKAGE OR CRUISE (SEE NOTE)	$														
RESTAURANT MEALS/REFRESHMENTS	$														
GROCERIES/BEVERAGES	$ 40														
RECREATION/ENTERTAINMENT	$														
SHOPPING/SOUVENIRS	$ 20														
OTHER EXPENSES	$ 10														
TOTAL EXPENDITURES FOR THE DAY	$ 145														

Tourism

Recreation and Culture

HON. BILL REID MINISTER

NOTES ON TYPES OF ACCOMMODATION

Types of accommodation could include:

- Hotel
- Motel
- Resort
- Bed and Breakfast
- Camper/Trailer/Tent
- Cruise Ship
- With friends or relatives
- etc.

NOTES ON PACKAGED TOURS AND CRUISES

If you were on a packaged tour or cruise durin all, or part of your stay in B.C., please follow th directions below:

- record on the line for Package or Cruise th approximate daily value for each day covere by the tour while you were in B.C.
- then place an X beside each of the specifi services provided in your package holiday c cruise for each day covered by the packag price in B.C.

Here's an example of how you would complet the expenditures section if your tour co $200/day and included accommodations, meal and entertainment, and you also did some extr shopping.

ACCOMMODATION	$ X	X	X
AUTO TRANSPORTATION (gas, repairs, rentals)	$		
OTHER TRANSPORTATION (ferries, buses, taxis)	$		
PACKAGE OR CRUISE (SEE NOTE)	$ 200	200	200
RESTAURANT MEALS/REFRESHMENTS	$ X	X	X
GROCERIES/BEVERAGES	$		
RECREATION/ENTERTAINMENT	$ X	X	X
SHOPPING/SOUVENIRS	$ 20		80
OTHER EXPENSES	$		
TOTAL EXPENDITURES FOR THE DAY	$ 220	200	280